



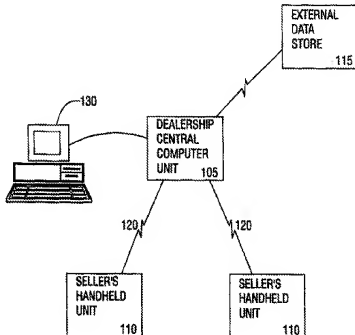
## INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

(51) International Patent Classification <sup>6</sup> : <b>G06F 17/00</b>	<b>A2</b>	(11) International Publication Number: <b>WO 99/14688</b> (43) International Publication Date: 25 March 1999 (25.03.99)
<p>(21) International Application Number: PCT/US98/19159</p> <p>(22) International Filing Date: 15 September 1998 (15.09.98)</p> <p>(30) Priority Data: 08/929,929 15 September 1997 (15.09.97) US</p> <p>(71) Applicant (for all designated States except US): ROSEFAIRE DEVELOPMENT LTD. [—/—]: 33 Church Street, Hamilton (BM).</p> <p>(72) Inventors; and (75) Inventors/Applicants (for US only): BROCKMAN, Robert, T. [US/US]; 903 Oak Valley, Houston, TX 77024 (US). JONES, Donald, D. [—/—]: Suite 235, 8 South Shore Road, Smiths, FL 05 (BM).</p> <p>(74) Agent: PYLE, Jeffrey, A.; Arnold, White &amp; Durkee, P.O. Box 4433, Houston, TX 77210 (US).</p>		<p>(81) Designated States: AL, AM, AT, AU, AZ, BA, BB, BG, BR, BY, CA, CH, CN, CU, CZ, DE, DK, EE, ES, FI, GB, GE, GH, GM, HR, HU, ID, IL, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MD, MG, MK, MN, MW, MX, NO, NZ, PL, PT, RO, RU, SD, SE, SG, SI, SK, SL, TJ, TM, TR, TT, UA, UG, US, UZ, VN, YU, ZW, ARIPO patent (GH, GM, KE, LS, MW, SD, SZ, UG, ZW), Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, CH, CY, DE, DK, ES, FI, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, GW, ML, MR, NE, SN, TD, TG).</p> <p><b>Published</b> <i>Without international search report and to be republished upon receipt of that report.</i></p>

(54) Title: PORTABLE SALES PRESENTATION SYSTEM WITH SELECTIVE SCRIPTED SELLER PROMPTS

## (57) Abstract

A handheld computer unit for use by, e.g., a car sales person (seller) prompts the seller with a standard script to be followed at each step in the process after a prospect enters a dealership. The prospect's response to the scripted questions is used to identify the prospect's particular interests of a general nature, e.g., safety, and of a specific nature, e.g., trailer towing capacity. When either a general or specific interest is identified, the seller is prompted to tailor the conversation to address the prospect's interests. Among other things, the handheld unit can perform functions such as (i) permitting the seller to retrieve useful information such as inventory availability from a sales information data store; (ii) displaying option-sensitive prompts to aid the seller in discussing specific vehicles under consideration; (iii) accessing remote communications links to external data sources to obtain information on credit-worthiness of the prospect, financing terms, and availability; (iv) displaying motivational information such as the percentage likelihood of consummating the sale successfully; (v) providing a communications link with management personnel.



# **FOR THE PURPOSES OF INFORMATION ONLY**

Codes used to identify States party to the PCT on the front pages of pamphlets publishing international applications under the PCT.

AL	Albania	ES	Spain	LS	Lesotho	SI	Slovenia
AM	Armenia	FI	Finland	LT	Lithuania	SK	Slovakia
AT	Austria	FR	France	LU	Luxembourg	SN	Senegal
AU	Australia	GA	Gabon	LV	Latvia	SZ	Swaziland
AZ	Azerbaijan	GB	United Kingdom	MC	Monaco	TD	Chad
BA	Bosnia and Herzegovina	GE	Georgia	MD	Republic of Moldova	TG	Togo
BB	Barbados	GH	Ghana	MG	Madagascar	TJ	Tajikistan
BE	Belgium	GN	Guinea	MK	The former Yugoslav Republic of Macedonia	TM	Turkmenistan
BF	Burkina Faso	GR	Greece			TR	Turkey
BG	Bulgaria	HU	Hungary	ML	Mali	TT	Trinidad and Tobago
BJ	Benin	IE	Ireland	MX	Mexico	UA	Ukraine
BR	Brazil	IS	Israel	MR	Mauritania	UG	Uganda
BY	Belarus	IS	Iceland	MW	Malawi	US	United States of America
CA	Canada	IT	Italy	MX	Mexico	UZ	Uzbekistan
CF	Central African Republic	JP	Japan	NE	Niger	VN	Viet Nam
CG	Congo	KE	Kenya	NL	Netherlands	YU	Yugoslavia
CH	Switzerland	KG	Kyrgyzstan	NO	Norway	ZW	Zimbabwe
CI	Côte d'Ivoire	KP	Democratic People's Republic of Korea	NZ	New Zealand		
CN	China	KR	Republic of Korea	PL	Poland		
CU	Cuba	KZ	Kazakhstan	PT	Portugal		
CZ	Czech Republic	LC	Saint Lucia	RO	Romania		
DE	Germany	LJ	Liechtenstein	RU	Russian Federation		
DK	Denmark	LK	Sri Lanka	SD	Sudan		
EE	Estonia	LR	Liberia	SE	Sweden		
				SG	Singapore		

- 1 -

PORTABLE SALES PRESENTATION SYSTEM  
WITH SELECTIVE SCRIPTED SELLER PROMPTS

**1. BACKGROUND OF THE INVENTION**

**1.1 Cross-Reference to Related Application**

5 This application is a continuation in part of co-pending "parent" application Serial No. 08/587,276, filed January 18, 1996, which is incorporated by reference in its entirety.

**1.2 Source Code Appendix**

10 The microfiche appendix filed herewith contains computer-program source code and database information for an illustrative implementation of the invention. The source code is copyrighted and is the property of the assignee of this application. Authorization is granted to make copies of the source code in conjunction with making facsimiles of this application and any patent(s) issuing thereon, but all other rights are reserved.

15 **1.3 Introduction**

The cost of any goods or services that are sold include costs of marketing. Every item (tangible or intangible) that is sold has included in its costs, the costs of "selling" it. Millions of people are employed in "selling" and hundreds of millions of man-hours are expended in direct face-to-face "selling" every year in the United States. The cost of "selling" is every bit as real a  
20 part of the cost of an item or service as is the direct labor cost involved in manufacturing the item or providing the service.

It is generally estimated that less than 10 percent of a salesperson's total time is spent actually "selling" — i.e. the direct face-to-face contact with a prospective buyer. Therefore the efficiency of the face-to-face sales process is directly related to the quality with which the face-  
25 to-face contact is carried out.

The present invention relates to a computer system that addresses some common information-flow problems in a large "industry," namely the sales process. The computer system organizes specific information to assist salesmen or saleswomen (referred to generically as "sellers") and management in making a presentation to a potential purchaser ("prospect"), in a  
30 methodical and consistent manner. Use of the system by a seller produces a number of practical

benefits, including a more effective matching of the prospect's needs to one or more specific products or services to the needs of the prospect, as well as faster determination of appropriate financing arrangements. This in turn results in a more satisfactory experience for the prospect and better on-the-job training for an inexperienced seller, both of which lead to more effective utilization of capital by the seller or his or her employer.

In a nutshell, the computer system reduces costs associated with selling, resulting in exactly the same benefits — lower cost and more effective utilization of capital — as systems which reduce costs associated with research, development, design, manufacturing, maintenance, etc.

#### 1.4 Human-Factors Problems in Large-Volume Sales Organizations

The sales process can be usefully thought of as an interaction between a prospect and a seller. When performed correctly, the process comprises a logical series of exchanges of information between the seller and the prospect, between the seller and management, between management and a credit bureau, etc. The actual steps will vary depending upon the type of product and the industry, but the concept of the sales process being a sequence of definable information exchanges remains the same.

Historically, however, the actual process of selling, when done on a large scale, has been a disorganized one. Some people are thought of as "born sellers" and need little training to be effective. With suitable training, many other individuals can learn the sales process and achieve good results. In large sales organizations such as car dealerships, however, turnover is frequently high. As a result, it is often not possible to count on having a population of sellers who all either are born sellers or have had suitable training. That means that variations in natural ability and training lead to what amount to inefficiencies of scale, with a concomitant reduction in productivity.

Such inefficiencies are not inherent to large-scale sales. A significant weakness of selling on a large scale is the inability to enforce a certain measure of standardization of the sales process on large numbers of sellers so that they consistently utilize proven sales techniques.

- 3 -

Sales efficiency (defined here as the ratio between sales consummated to prospective buyers dealt with) improves dramatically when sellers record sufficiently complete data on sales prospects to achieve other goals, such as follow-up communication by phone or mail with those prospects that did not make a purchase, correct determination of closing ratios for each individual  
5 seller, or analysis of the advertising source that initially captured the prospect's attention. Inefficient sellers can be given additional training or, if necessary, weeded out when correct determination of sales efficiency ratios for individual sellers can be made accurately, quickly, and with reduced overhead. Advertising efficiency (defined here as the ratio of advertising dollars spent to the gross sales volume produced) is enhanced by analyzing the advertising sources that  
10 initially capture prospect attention.

An illustration of the need for such a system can be seen in a car dealership, an area in which very large dollar volume sales occur and the sales process is sometimes poorly administered. In general, dealerships have several characteristics in common:

1. Due to less-than-perfect (or even virtually non-existent) pre-employment  
15 screening, dealerships may hire sellers that lack true sales proficiency, a problem in most types of retail sales operations.
2. Due to long hours, Saturday work days, and a poor industry image, car dealerships may suffer from high levels of personnel turnover, particularly in the sales departments (in which 100%+ turnover per year is not uncommon).
- 20 3. Due to turnover, dealerships are faced with a constant re-training need, which in some cases is poorly accomplished.
4. Many dealerships hire experienced sellers from other dealerships on the assumption that they are good at what they do and do not require training, when in fact these experienced sellers may use very poor sales techniques.
- 25 5. Many dealerships refrain from hiring new, inexperienced sellers because they do not want to make an investment in training or suffer loss of productivity as a new seller comes up to speed.

- 4 -

6. Ironically, dealerships do not want to invest in sales training precisely because turnover is high and the investment would be "wasted" in their view. This tends to produce high failure rates among new sellers.

### 5 1.5 Prior Attempts at Standardizing the Sales Process

A scattered few vehicle manufacturers (e.g., Lexus, Infiniti, and Saturn) have spent large amounts of time and money attempting to improve the quality and consistency of procedures to control the sales process. Dealerships that exert control over the vehicle sales process have in general been far more successful than those that have not. Many of these dealerships have elaborate pencil and paper control procedures. Some employ computerized systems, but as far as is known they record data only after the fact.

### 1.6 Long-Felt Need

Despite the modest success of these procedures, direct real-time supervision of the sales process has long been recognized as difficult. To be effective, such supervision must take place where the sales presentations are made, i.e., in changing physical locations throughout the dealership, not at a desk or counter where a supervisor can observe. A sales manager's presence during the conversations between the seller and the prospect, however, is likely to undermine the rapport-building that can be critical to the success of the sales process.

The problem is exacerbated by the need for ready communication between the seller and his or her manager, or "control desk." Thus, the need for direct managerial supervision is simultaneously created and made more difficult by the nature of the business. The need is highlighted by the fact that, because considerable advertising dollars are invested in attracting new business to the dealership, each prospect that is handled less than optimally may represent a substantial lost profit opportunity.

## 2. SUMMARY OF THE INVENTION

A computer system in accordance with the present invention addresses many of these problems, including improvement, standardization, and enforcement of the sales process;

- 5 -

efficient training of new sellers; and real-time control of the process by management. The system comprises one or more handheld computer units used by sellers that may be linked with a central computer unit. Each dealership decides the exact sequence that it would like its sellers to follow. The handheld unit then prompts the seller with a standard script to be followed at each

5 step in the process after a prospect enters the dealership. The prospect's responses to the scripted questions are used to identify the prospect's motivation (e.g., safety) or specific interest (e.g., trailer towing capacity). Software switches can be used to indicate motivations or specific interests. The switches are monitored during the sales presentation. When a motivation or interest is identified, the handheld unit prompts the seller to introduce information corresponding

10 to the identified interest.

### 3. BRIEF DESCRIPTION OF THE DRAWINGS

Figure 1 is a block diagram of a system in accordance with the invention.

Figure 2 is a perspective view of a specific embodiment of a handheld unit in accordance

15 with the invention.

Figures 3 through 21 are screen prints of illustrative screen displays created on a handheld unit by a specific implementation of software in accordance with the invention. The screen displays, discussed in more detail below, implement the invention for a car dealership.

Figures 22 through 70 are illustrative scripts used in a specific implementation of the

20 invention for a car dealership. The organization of the scripts is discussed below.

### 4. DETAILED DESCRIPTION OF SPECIFIC EMBODIMENTS

#### 4.1 Overview of Illustrative Embodiment

One illustrative embodiment of the invention takes the form of a system for enforcing

25 recording, by a seller, of information about a vehicle-purchase prospect at an automobile dealership. In the interest of clarity, not all features of an actual implementation are necessarily described in this specification, although many additional details of such an implementation can be found in the microfiche appendix. It will of course be appreciated that in the development of any such actual implementation (as in any computer-system development project), numerous

engineering and programming decisions must be made to achieve the developers' specific goals and subgoals (e.g., compliance with system- and business-related constraints), which will vary from one implementation to another. Moreover, attention will necessarily be paid to proper programming practices for the environment in question. It will be appreciated that such a development effort might be complex and time-consuming, but would nevertheless be a routine undertaking of system development for those of ordinary skill having the benefit of this disclosure.

As shown in Figure 1, at its most basic, the illustrative system comprises one or more seller computer units 110 operated by sellers and may also include a central computer 105. The seller computer unit 110 may be of a size suitable to held in a seller's hand, referred to simply as a "handheld" unit, although it may be held in the seller's hand, used on a table or on the seller's lap, suspended from a strap around the seller's neck, etc. The illustrative examples discussed below all involve such handheld units. Alternatively, the seller computer unit 110 may comprise a fixed unit, e.g., a desktop computer with suitable programming.

The handheld computer unit 110 manages a sales-information data store, utilizing any convenient database management system (DBMS) software. This sales-information data store may also be located on the central computer. The external data store(s) are remotely located at places such as vehicle manufacturers, credit bureaus, and credit granting institutions on their computer systems 115.

#### **4.2 The Sales-Information Data Store**

The sales-information data store, which may be maintained at or by the handheld computer unit 110, or at the central computer 105, or both, includes a number of specific databases. Virtually any of the databases referred to herein can be either local databases on the handheld unit (updated periodically from a central computer or other data store, e.g., via a serial or parallel cable, a network connection, a radio link, or an infrared link) or remote databases located on the central computer, accessed through a conventional disk search or through an on-line query. Some or all of the databases may be combined if desired into a single complex



database, as will be recognized by those of ordinary skill having the benefit of this disclosure.

The databases include:

(1) a vehicle-inventory information database, which can include both a dealer's database as well as those vehicles in the inventory of other dealerships in a commonly owned group of dealerships. Inventory information is valuable when the seller cannot locate the particular item sought by the prospect;

(2) a customer database, containing conventional information about customers who have made purchases, enabling the seller to identify a prospect as a valuable repeat customer if one should return to the dealership;

(3) a prospect database, likewise containing similar information about prospects who have visited the dealership. With this information, management can determine if there is a pattern in the point at which sales processes are breaking down, or whether a certain seller suffers from very poor sales efficiency. Very importantly by interrogating this database a prospect can be identified as a returning prospect. A returning prospect, known in the auto industry as a "be-back" prospect, has a percentage likelihood of successful consummation of sale that is easily triple that of a prospect on a first time visit. The reason for this is that a "be-back" prospect has completed his or her shopping process and is now ready to make a purchase. For this reason a "be-back" prospect is especially valuable and deserves special attention. Further, the availability of such information saves the time involved in re-entry of data if the prospect returns to the dealership at a later date;

(4) a pending-transaction database, referred to colloquially herein as a "deal" database. Typically a record is started in the pending-transaction database when the first actual offer is made to or by the prospect. Stored information on pending transactions allows managers to monitor sales transactions as they are taking place, enabling them to insert themselves into the sales process if a deal begins to turn sour; and

(5) control-record information, which can provide, for example: data on financing and leasing plans; data on taxes and fees that would apply to the particular sale; information on other products or services frequently sold in conjunction with the desired purchase item.

information on commission rates that apply to various components of the sale, or the sequence and content of each step in the sales process.

#### 4.3 External Data Stores

Useful information may be contained within databases at one or more external data stores 115 such as manufacturers, credit bureaus, and credit-granting institutions. For example, vehicle manufacturers commonly maintain real-time updated databases of vehicles on order, in production, in transit, and in the inventories of all dealerships nationwide. When a situation is encountered where the dealership does not have on hand the vehicle that the prospect desires, the seller can access this external data store from a handheld computer to see if a suitable unit exists 160 somewhere in the distribution system.

These external data stores may be accessed directly from the handheld unit or through the communications network to the central computer that has a conventional modem attachment to the telephone network to the vehicle manufacturer.

#### 4.4 The Hand-Held Computer Unit

The handheld computer unit 110, referred to as a handheld unit, may be a custom-designed unit or a suitably programmed subnotebook computer or personal digital assistant (PDA). It may be a stand-alone unit; or it may be designed for use as a smart wireless terminal 20 in a larger system including a central computer unit 105; or it may be designed to operate in either stand-alone or smart-terminal mode at the user's option.

A) WIRELESS LINK 120: The handheld unit 110 may have a conventional communications interface or link 120 to the central computer unit 105 or to other handheld unit(s) 110, preferably a wireless link 120 to enable user mobility. The wireless link 120 may take the form of, e.g., a 25 radio modem, an infrared beam, or similar devices.

B) INPUT DEVICE: The handheld unit 110 has a conventional input device operable by the seller for recording data about the prospect, along with suitable conventional programming for managing the input process. The input device may take the form of, e.g., a keyboard; a touchscreen such as those found on many PDAs; a pointing device such as a mouse, trackball, or

J-stick; or a voice-recognition unit. The input device may also have an audio recording input capability.

C) TRANSMISSION OF PROSPECT DATA: The handheld unit 110 may include programming for transmitting prospect data to the central computer unit 105 or to other handheld units 110 via the communications link. The prospect data may be transmitted to the central computer unit 105, but may also be retained locally at the handheld unit 110.

D) SALES INFORMATION REQUESTS: The handheld unit 110 includes programming for interrogating the sales-information data store to obtain information requested by the seller. This may include, e.g., inventory information to determine which cars are in stock or can be obtained quickly.

E) DISPLAY: The handheld unit 110 includes a conventional display (e.g., an LCD display) and suitable programming for displaying requested sales information to the seller. As noted above, display of the requested information may be contingent on the seller having entered all required prospect data and complying with steps in the sales communications process that is required by sales management.

F) LOCAL DATA STORE: The handheld unit 110 may include a local data store (e.g., read-write memory or "RAM," flash memory, or a hard disk drive) for locally storing some or all of the sales information data store. This permits the handheld unit 110 to operate independently of the central computer unit 105 if desired, advantageously reducing wireless communications traffic and permitting use of the handheld unit 110 if the central computer or wireless communications link are inoperable.

G) EXTERNAL DATA STORE: The handheld unit 110 may access databases at external locations such as the external data store 115 via direct communications or by communications over the wireless link 120 to a central computer 105, which has a conventional communications link over telephone lines to the external data store. The communications link may be a modem-type link or a direct digital connection, e.g., an ISDN line, a T1 or T3 line, etc.

#### 4.5 Sales Communication Process

A) SPECIFIED SEQUENCE: The handheld unit 110 includes programming to prompt the seller to perform a specified sequence of steps in a desired sales communication process. The programming may take the form of pre-stored scripts, in a suitable macro-like script language, that are conventionally interpreted by an interpreter (or alternatively are conventionally compiled into executable form) and which, when executed by the handheld unit 110, cause the handheld unit 110 to display appropriate messages on a display.

Different scripts may be used for different sales contexts. For example, a script for an in-person visit by a prospect may prompt the seller to handle the encounter differently than for a telephone inquiry.

The sales communications process(es), and thus the script(s), will normally include obtaining prospect data and recording it in a data store in the handheld unit 110; the scripts preferably take into account the prospect data as it is entered by the seller. For example, if the initial prospect data entered by the seller indicates that the prospect is young, then the programming script may prompt the seller to ask whether the prospect would be interested in a first-time-buyer financing package and to record that prospect data.

B) PRODUCT PRESENTATIONS: The handheld unit 110 may include programming to display a series of scripted product features and benefits. These scripts may vary based upon the particular product that the prospect is interested in. A comprehensive product presentation is key element of a successful sales process.

C) RECORDING OF DATA: For greater usefulness of the system, the seller is asked to record the prospect's personal information such as name, address, etc., early in their meeting. As the seller records the information into the handheld unit 110, the information may be conventionally transmitted (on a real-time basis or periodically in a batch) to other handheld units 110 or to the central computer unit 105 for storage in the appropriate database for use in a conventional sales prospect follow-up system. Thus, no matter how the sales transaction ends, the dealership will always have a record of the prospect's visit and can follow-up the visit with a letter or phone call.

- 11 -

Human factors are a disincentive to comply with recording of prospect data: Since sellers are evaluated on their sales efficiency, they have a disincentive to record data on prospects that do not purchase since this would reflect negatively on their sales efficiency ratios. Historically for this reason sellers in this situation have done a very poor job of collecting prospect data in spite of its obvious usefulness to the dealership.

D) INCENTIVES TO COMPLY WITH SALES PROCESS: Notably, the sales-information-request programming of the handheld unit 110 includes one or more program routines to deny access by the seller to the sales-information data store and to the remote communications links to the external data sources, and to display an appropriate reminder message, if the seller has not complied with the specified steps in the sales process. This gives the seller a large incentive both to comply with the process and to record data as required by the process. For example, the program routines may prevent the handheld unit 110 from accessing the vehicle-inventory information database if all required prospect data has not been entered. Alternatively, the routines may permit the handheld unit 110 to obtain the requested data from the sales information data store, but then not permit the data to be displayed until all required prospect data has been entered. As with many of the program routines described for the handheld unit 110, these program routines may equivalently be located in and control the central computer unit 105 to prevent that unit from transmitting requested data to the handheld unit 110.

E) TIME STAMPS: The illustrative handheld unit 110 includes suitable conventional programming for recording time stamps to identify the time and/or duration of performance of respective steps in the desired sale communication process. The time stamp records are used to record the actual time (either clock time or elapsed time during the sales encounter) at which the seller records specified information. This permits sales management to confirm with reasonable confidence that the seller is in fact performing the appropriate steps in the sales communication process instead of, e.g., recording fabricated or "bogus" data all at once. For example, if the manager sees that a certain seller's tour of the dealership facilities with a prospect lasted only 15 seconds, the manager knows the seller has circumvented that step in the process and can counsel him or her. The time stamps can both be recorded locally at the handheld unit 110 or uploaded to the central computer unit 105 via the communications link for statistical analysis of seller

- 12 -

performance. Alternatively, the time stamp records can be created at the central computer unit 105 as prospect data and other data are transmitted by the handheld unit 110.

5 F) EXTERNAL CHECKS ON PROCESS COMPLETION: Suitable programming can be included in the handheld unit 110, the central computer unit 105, or both, for receiving and processing a signal from an external device indicating that a specified step in the sales communication process has been completed. The external device may be, e.g., a sensor in an vehicle key storage machine that signals when a particular seller, identified by a password or an electronic keycard (similar to a bank automated teller machine card), checks out the keys to a car for a test drive. Other external devices may be advantageously utilized to verify the physical location of the seller at a particular time, thus serving as an additional check on the seller's compliance with the specified sales communication process.

10 Similarly, programming can be included for sending a signal to a gate controller to open a vehicle access gate. The seller, when driving out of the dealership parking lot for a test drive, thus can use the handheld unit 110 to send a signal to the gate controller, either directly or via the central computer unit 105. The handheld computer 110 logs the fact that the seller is leaving the premises on a test drive with the prospect in question. Again, this verification of the seller's physical location at a particular time serves as a check on the seller's compliance with the sales process.

15 G) SELECTIVE AUDIO RECORDING: Conventional hardware and suitable programming may be included in the handheld unit 110 for selective audio recording of a conversation between the seller and the prospect. Selective audio recording of the actual conversation between the seller and the prospect can be useful. For example, Saleswoman A may be known to perform well in obtaining initial prospect wants and needs. Audio recording of this portion of her conversation with the prospect may be deemed unnecessary and thus can be skipped. On the other hand, Salesman B may be weak in this area; when he indicates on the handheld unit 110 that he is in this phase of the desired sales communication process, the handheld unit 110 may automatically commence audio recording until the next phase of the conversation. Sales management is then able to selectively listen to the actual sales process as it progressed and counsel the seller on sales techniques. If required by privacy laws, the handheld unit 110 may be

- 13 -

programmed to play an audible message on commencement of recording, such as "to help ensure quality service, this conversation may be monitored or recorded."

5 H) FINANCING ASPECTS: The handheld unit 110 may include programming for transmitting identifying information about the prospect and a creditworthiness inquiry to a financial institution computer 125, and for receiving and processing a creditworthiness report from that computer. If the handheld unit 110 includes an input device that can store a signature digitally, then the prospect can be asked to "sign" an authorization granting the dealership permission to access the user's credit history. The input device may be a conventional pen- and touch-screen interface of the kind found in some PDAs; a similar device of the kind found at  
10 some cash registers for credit card authorizations; or the like. Access to the financial institution computer 125 may be via direct link or may be through a conventional data link such as a modem controlled by the central computer unit 105. The financial institution may be a credit bureau or an actual financing source. In the latter case, the financing source may perform its own credit check and make a preliminary creditworthiness determination to be transmitted back  
15 to the seller. This in turn helps the seller qualify the prospect, i.e., to determine the price range of the vehicle for which the prospect is likely to be able to obtain financing.

I) COMPUTATION OF FINANCE TERMS: The handheld unit 110 may include conventional programming enabling the seller to use it as a financial calculator for calculating, e.g., lease payments, loan payments, and the like. As the sales process progresses, the prospect data,  
20 creditworthiness report, and finance terms may be transferred to another handheld unit 110 or a central computer system 105 for finalization of paperwork or for negotiation purposes as described below.

J) REAL-TIME NEGOTIATION: The handheld unit 110 programming may include routines to permit the seller to send offers to and counteroffers to other handheld computers 110 or the  
25 central computer unit 105. A sales manager or similar person may read and respond to these exchanges, e.g., using another handheld unit 110 or a terminal 130 attached to the central computer 105. By eliminating most of the seller's trips back and forth from the prospect to the sales manager's desk, much of the time needed to consummate a sale is reduced. This reduction of time spent in the negotiating process is a vital element in improving sales efficiency since if

- 14 -

this process becomes extended, the prospect is increasingly likely to have misgivings and decline to consummate the sale. The capacity for real-time negotiation becomes increasingly valuable in situations of high activity (like a Saturday), when there are a large number of sellers per sales manager, when the average experience level of sellers is low, when there is a large number of  
5 sellers working at a single location, or when the physical distances at a given location between sellers and sales management are large.

K) REAL-TIME SALES PROGRESS DISPLAY: The programming of the handheld unit 110 may include routines for real-time computation and display of sales progress information applicable to the transaction. For example, the likelihood of closing the sale may be estimated  
10 and displayed on the handheld unit 110 by comparing factors such as (a) the length of time that the prospect has consented to spend with the seller during each step of the sales process, and/or (b) the number of steps in the process that have been completed, with historical data on previous sales process outcomes (e.g., stored in the sales information data store) for that dealership, that city, etc. This likelihood may be displayed in a variety of ways (e.g., a percentage number, a  
15 gas-gauge indicator, etc.) to show the likelihood of closing the sale going up as each step is completed. This encourages the seller to perform each step thoroughly, taking sufficient time to communicate the desired information to the prospect.

L) REAL-TIME SALES COMMISSION DISPLAY: The programming of the handheld unit 110 may include routines for real-time computation and display of the commission that would be  
20 paid to the seller if the sale were to be consummated on the specified terms. This can serve as a powerful sales motivator for the seller.

M) COMPARATIVE RANKING AMONG SELLERS: The handheld unit 110 may also be programmed to display a list of sellers at the dealership, ranked by performance for a given period, e.g., by sales achieved in a given month. This constantly updated real-time display of  
25 sales rankings also can serve as a sales motivator for sellers.

N) DETERMINATION OF PARTICULAR PROSPECT INTERESTS: The programming and data structures of the handheld unit 110 may also be designed such that answers to scripted questions provide an indication of the prospect's general interests (sometimes referred to here as "motivations") or specific interests (sometimes referred to here as "hot buttons"). For example,



the prospect's responses to questions may indicate that the prospect is generally interested in safety. Other typical prospect motivations include performance, economy, and style, to name but a few examples. Moreover, the prospect may be specifically interested in features of a car such as air bags, trailer towing packages, etc. Some or all of these various interests may have different  
5 degrees of importance to different prospects.

If a prospect's answers to questions (alone or in combination) indicate the presence of one or more general interests or specific interests, that fact(s) is noted by setting one or more flags within an appropriate data structure, either within the handheld unit 110 or within the central computer unit 105. The handheld unit 110 then prompts the seller to ask specific additional scripted questions or make specific additional comments related to that interest to help  
10 focus the discussion. The handheld unit 110 thus helps the seller do what an expert seller likely would do intuitively.

This can be implemented in a variety of ways. For example, the programming of the handheld unit 110 may be designed so that the required flags are maintained in a suitable data  
15 structure in memory within the handheld unit. The term "flag" is used here to include values of specific data variables. For example, if a prospect's responses indicate that she has two children, ages 4 and 2, the fact that she has children and their respective ages may be recorded in appropriate variables and used as flags concerning safety as a motivation and for fold-down child seats as a possible hot button. Then again, if the prospect's answers indicate that she  
20 affirmatively does not plan to use the car to carry her children (e.g., she is buying the car for her college-bound oldest child), the fact that she has younger children may be overridden.

The overall logic of the programming in this regard is quite simple: At one or more appropriate points in the encounter between the seller and the prospect, if a flag is set indicating that the prospect has a particular motivation (as determined, e.g., by the prospect's responses to  
25 particular questions), then the seller is prompted to provide information or ask questions relevant to that motivation. For example, if a flag is set indicating that safety is a motivation for the prospect, then at one point in the encounter the seller is prompted to mention the fact that the vehicle has side air bags; at another point the seller is prompted to mention the vehicle's built-in, fold-down child seats; and so on.

Motivation switches and hot buttons of this kind can also be implemented in whole or in part in the central computer unit 105. For example, the central computer unit may determine from the prospect's ZIP code that the prospect lives in an area in which mini-vans are popular. In response, it may prompt the seller, via the handheld unit 110, to suggest to the prospect that  
5 "you know, a lot of people in your neighborhood are buying this model of mini-van."

As would be apparent to one skilled in the art, conventional programming methods can be used to determine a prospect's motivations and hot buttons. Thus, the actual implementation of the required programming is immaterial here.

O) SELECTIVE PRESENTATION OF PRODUCT OPTIONS: Many products sold to the public  
10 include various options. For example, cars, trucks, and similar vehicles often come with options such as air conditioning, a trailer-towing package, built-in child seats, etc. A seller will frequently make a sales presentation about a specific example of a product, e.g., a specific car or truck on the lot. It may be desirable for the seller to talk only about options actually installed on that specific car or truck. An experienced seller is likely to know this. A novice seller, on the  
15 other hand, may not be aware which options are installed on the particular car or truck (or may not even be aware of the extent of the available options).

The programming and data structures of the handheld unit 110 therefore may be designed to be sensitive to the actual options installed on a particular vehicle. The vehicle identification may be obtained and inputted into the handheld unit 110 in any convenient manner, e.g., by  
20 selecting from a menu of available vehicles having specified characteristics or by direct entry of the factory-applied vehicle identification number (VIN). Information about the options installed on that particular vehicle may be stored in the sales-information data store as described above.

The programming for the sales communication process can then easily be designed to prompt the seller to talk at a suitable point about the specific options already installed on the  
25 vehicle, e.g., in response to the motivation switches and hot buttons described above. The script for the sales communication process can include suitable remarks for the seller to make, e.g., "this particular car has the new high-performance engine already installed." Additional information about the option can be displayed if desired, either automatically or in response to a command inputted by the seller.

The programming and data structures of the handheld unit 110 can also be designed to provide the seller with a list of options that could be installed on that vehicle if desired. In that way, if the prospect indicates interest in other options, the seller can respond with an appropriate list.

If the prospect indicates interest in an option not already installed on that vehicle, the handheld unit 110 may identify from the sales-information data store a vehicle that does already contain that option and display that information to the seller.

If the prospect is trying to decide which specific vehicle he or she prefers, the handheld unit 110 may display a compare-and-contrast list of options for each vehicle, e.g., in table form.

It will be appreciated by those of ordinary skill having the benefit of this disclosure that programming of these option-sensitive features is conventional. A simple implementation entails providing, in the sales-information data store, a data structure with option information about each specific vehicle on the lot. Depending on the implementation, the data structure may include a flag indicating the presence of an option and/or more detailed information about the option. The portion of the programming that causes display of a script on the handheld unit 110 simply checks the data structure to determine whether a particular option is present and modifies the script accordingly (possibly depending on other factors such as whether the prospect has expressed any interest in the option).

P) INCORPORATING PROSPECT INFORMATION INTO CUSTOMIZED SCRIPTS: The data collected about the prospect during the sales presentation can be used to customize the script displayed to the seller through simple parameter substitution. The customized script can reflect information such as the prospect's name, spouse's name, children's names, current vehicle owned, mileage on current vehicle, etc. This may help the inexperienced seller build a rapport with the prospect in the same way that experienced sellers do. The customization can be readily implemented in conventional fashion in the programming of the handheld unit 110, the central computer unit 105, or both, as convenient.

The simplest example of such customization is probably the parameterized substitution of the client's name into the script. Some sellers believe that use of the prospect's name is a key factor in building a rapport with the prospect. Suppose that the seller has input data into the

handheld unit 110 (or retrieved it from the sales-information data store) indicating that the prospect is female, she is a physician, and her last name is Jones. At an appropriate point the script might include a reminder to work the prospect's name into the conversation. The unsubstituted script might read "<Title> <Last\_Name>, if you have time, let's take a test drive."  
5 As displayed to the seller on the handheld unit 110, it would read "Dr. Jones, if you have time, let's take a test drive."

As a more sophisticated example, suppose that the prospect, Dr. Jones, has said that she has a one-year old son John and that she is interested in a particular model of mini-van because it has built-in child seats. If the script is option-sensitive as described above, at an appropriate  
10 point it can suggest that the seller make a comment such as "You see the child seats back here -- they're designed for children three months to five years old, so <Child\_Name> should be able to use it till he's big enough to go without one." As displayed to the seller on the handheld unit 110, the script reads "... so John should be able to use it till he's big enough to go without one."

15 Q) "RECAPPING" SCRIPT SEGMENT: One skill of an experienced seller is the ability to remember those features of a product that aroused the prospect's interest during the sales communication process and to recap them orally during the closing stages of the process. To the extent that the seller provided data to the handheld unit 110 indicating the prospect's interest in specific options (or if the data was already present in a sales-information data store), then upon a  
20 suitable command from the seller (possibly in response to a reminder prompt from the handheld unit 110), a recap list of those options is displayed on the handheld unit 110. Alternatively, the handheld unit 110 can display the recap list automatically when the information available suggests that the sales communication process has entered a specified phase.

R) "MANAGER HELP" BUTTON: For any given prospect, an inexperienced seller is likely  
25 to encounter difficulties at some point. The seller might not be saying the right things at the right time. There might be a personality conflict, mild or severe. There are undoubtedly dozens of reasons why any given sales communication process might go badly for an inexperienced seller.

- 19 -

Consequently, inexperienced sellers are trained to go get their managers if they sense that they are losing control of the sales communications process with a given prospect.

Unfortunately, this often entails a seller asking the prospect to wait while the seller finds the manager. As often as not, the prospect seizes the opportunity to depart gracefully — resulting in a lost sales opportunity. This can cause inexperienced sellers to be reluctant to leave the prospect to go the manager. In those cases where an experienced sales manager can be discretely brought into the sales communication process, however, there is a reasonable chance that the situation can be turned around and the prospect converted into a buyer.

To address this situation, the handheld unit 110 may include a “Manager Help” button.

The Manager Help button is very similar in concept to the “panic button” found on handheld units available for some home-security systems — a householder can keep the handheld unit on or near his or her person; pressing the panic button transmits a signal to the security service, which sends someone to investigate.

The Manager Help button may be conventionally implemented in hardware or, preferably, in software as an icon or menu choice on the display of the handheld unit 110. When the seller “hits the button” (literally or figuratively), the handheld unit 110 signals the central computer unit 105 that a manager’s assistance is required. The central computer unit 105 then generates an appropriate message on, e.g., a terminal in the sales manager’s office. The message may include information such as the seller’s identity and a summary of what has transpired in the sales communication process with that prospect. The sales manager can then “stop by” and very naturally introduce him- or herself into the sales process.

The Manager Help button can be implemented so that pressing the button brings up a menu or a series of icons indicating different kinds of available assistance. The available assistance might include items such as “Soft drinks” (resulting in someone coming to take the prospect’s drink order), “Service department,” (resulting in a service-department representative coming to join the conversation), and the like. One or more of these items can be in addition to, or in lieu of, the manager assistance described above.

S) CACHING OF SCRIPTS, ETC.: If a suitably fast wireless link is available between the handheld unit 110 and the central computer unit 105, then the handheld unit can be programmed

- 20 -

to interact with the central computer unit on a real-time basis while in use and while in range of the central computer unit. Thus, when a seller is using the handheld unit 110 in range of the central computer unit, it effectively acts as a wireless terminal for the latter unit.

In that way, the seller uses the most current version of the scripts, sales information, etc. (referred to here as the "information load" of the handheld unit), as is practicable. That means, for example, that the seller will have up-to-date information about the vehicle inventory; he or she will not attempt to sell a prospect a vehicle that has already been sold, nor attempt to show a vehicle that is already being test-driven by another prospect (assuming that such information is kept current in the central computer unit 105).

But the handheld unit 110 is designed to be used in a mobile environment. There likely will be times when the handheld unit is out of range of the central computer unit 105, e.g., if the seller is on a test drive with a prospect.

To address that problem, the information load may be periodically downloaded from the central computer unit 105 into storage (preferably nonvolatile storage such as a hard disk drive or nonvolatile RAM) on the handheld unit 110. That makes the information load available for use by the seller even if the handheld unit loses contact with the central computer unit. In concept, such downloading is much like the "caching" of Web pages, graphics, etc., by browsers such as Microsoft's Internet Explorer and Netscape's Navigator, so that the Web pages and graphics can be viewed even if the user does not have a current connection to the Internet.

The downloading operation is preferably performed automatically upon startup of the handheld unit 110, e.g., through the use of an AUTOEXEC.BAT file or a Windows 95 Startup program. Such downloading, when successful, ensures that the handheld unit gets a current information load.

T) DATA COMPRESSION: If desired, the downloading may use data-compression and decompression techniques to speed up the data transmission. That is, the central computer unit 105 may use any of a variety of conventional data-compression algorithms to substitute short strings of characters in place of long strings. For example, in the so-called dictionary approach, the central computer unit 105 would transmit comparatively short codes in place of longer strings of data characters; the handheld unit 110, using a compatible dictionary, would translate

- 21 -

the codes back into the original longer strings of data characters. (The programming of the handheld unit 110 can be designed to store the data in compressed form and decompress on an as-needed basis instead of decompressing it immediately upon receipt.) Well-known examples of dictionary-based data compression include those pioneered by Lev and Zimpe1 as well as  
5 several variations on the basic LZ approach such as Lev-Zimpe1-Welch (LZW); in these examples, dictionaries are built up "on the fly" to match the actual data transmitted.

U) REFRESH-TYPE UPDATING: If the information load is downloaded into nonvolatile storage in the handheld unit 110, the downloading operation can be conventionally designed to function in the well-known "refresh" mode. That is, the central computer unit 105 determines  
10 which portions of the desired current information load are already present in the handheld unit 110 and downloads only those portions that are not already present. The refresh operation may be performed in any convenient manner. One simple approach is for the central computer unit 105 to send a signal to the handheld unit 110 directing the handheld unit to provide a directory listing of the separate data files making up its information load, including the dates and  
15 times of each file. That information can be used by the central computer unit to determine which files should be updated. Alternatively, conventional record-level marking or tagging can be used to determine which if any record(s) in a database of scripts, sales information, etc., are candidates for updating.

V) PERIODIC UPDATING OF DATA: After initialization of the information load, selected  
20 portions thereof may be updated from time to time to reflect ongoing changes in the sales information data store. For example, a car dealership may refresh its handheld units 110 by downloading updated data whenever a specific vehicle is sold, so that other sellers will no longer attempt to test-drive that vehicle; or whenever new vehicles are added to the inventory. The update operation may be performed on a periodic basis, e.g., once per hour, once every four  
25 hours, etc. It may also be performed on an as-needed basis, e.g., when an inventory item (such as a specific vehicle) is sold or is added to the inventory. The update operation could be performed in some combination of periodic and as-needed basis. The update operation may be initiated by each handheld unit 110 or by the central computer unit 105.

#### 4.6 Description of Specific Illustrative Embodiment

HARDWARE: One possible embodiment of the handheld unit 110 is the Fujitsu Stylistic 1000 RF, shown in Figure 2 identified by the reference numeral 200 / 110, running the Microsoft Windows 95 operating system. In implementations involving outdoor sales work (e.g., car dealerships), the available transreflective monochrome liquid-crystal display (LCD) option is preferred for the screen 205 for greater visibility in sunlight. This model of the Stylistic 1000 includes an antenna 210 for a spread-spectrum radio; if a different model without a built-in wireless link is used, then a separate unit such as an ARLAN wireless LAN adapter can be inserted into the PCMCIA slot (sometimes called the PC Card slot) on the handheld unit. Data entry can be accomplished with a stylus 215. The unit advantageously includes a hot-swappable battery, permitting the battery to be changed without powering down the unit. At this writing, more detailed information is available at <http://www.fpsi.fujitsu.com/products/st10RF.htm>.

A) SOFTWARE - SCREEN DISPLAYS, DATA ENTRY: Figures 3 through 21 show examples of screen displays and data entry fields. The examples are from an experimental prototype of the invention designed for use in car dealerships. The Figures show fictitious prospect data in the displays. It will be appreciated by those of ordinary skill having the benefit of this disclosure that other screen arrangements are possible and, in other contexts, may be preferable to the ones shown here; for example, an implementation of the invention for use in a jewelry store obviously will be different from the car-dealership illustration shown in the drawings. Which specific screen arrangement to use in a given context is a matter of design choice for the artisan.

As seen in Figures 3 through 20, the prototype display- and data-entry screens for a given prospect are conventionally organized by representations of notebook tabs shown at the bottom of each screen. A given screen can be brought up on the display 205 of the handheld unit 110 by clicking with the stylus 215 on the appropriate tab. As is customary for such a display organization, the tab for screens not actually being viewed may be shown in a different color or shading than the tab for the screen being viewed. The specific prototype display / data entry screens shown in the Figures are described in Table 1 below; three-letter codes correspond to the codes at the lower right portion of various (but not all) screens.



TABLE 1: DESCRIPTION OF SELECTED FIGURES

Figure 3	INF	Prospect info	Basic information about the prospect, e.g., name, address, phone number
Figure 4	PER	Prospect personal data	More detailed information about the prospect such as Internet address, nickname, hobbies
Figure 5	COB	Co-buyer data	Information about a co-buyer such as a husband or wife
Figure 6	WAN	Prospect wants	Details about what the prospect wants in a vehicle
Figure 7	TRA	Trade-in	Information about the car the prospect wants to trade in
Figure 8	APP	Trade-in appraisal	Trade-in appraisal information
Figure 9	SEL	Vehicle search (Attributes and Price / Payment tab)	A form for searching the sales data store to locate vehicles matching specific criteria
Figure 10	SEL	Vehicle search (Options tab)	A form for searching the sales information data store to locate vehicles matching specific criteria
Figure 11		Vehicles found	A list of vehicles found in the sales information data store that match the search criteria, along with detailed information about a highlighted vehicle
Figure 12	VEH	Selected vehicle	Information about a specific vehicle; includes a "Hold for salesman" button in the lower right corner to place a temporary hold on the vehicle
Figure 13	CBI	Credit bureau inquiry	Displays information to be sent to a credit bureau. Includes a "Send" button in the lower right corner, which causes a credit inquiry signal to be transmitted.
Figure 14	OFF	Prospect offer	A screen showing the current status of offers and counteroffers.
Figure 15	SOL	Sold	Information about a specific vehicle sold to a specific prospect
Figure 16	DEL	Delivered	Information about a specific vehicle delivered to a specific prospect

TABLE 1: DESCRIPTION OF SELECTED FIGURES

Figure 17	Select a vehicle position	A graphical touch-screen prompt that brings up script prompts with suggested points for the seller to discuss about the area of the car touched (see Figures 18, 19). If the sales information data store contains enough specific information about the various makes and models of vehicles, additional touch-screen prompts can be "nested," e.g., touching the "Interior" region brings up a list (or diagram) of interior features such as air conditioning, cruise control, etc.
Figure 18	Speed Control	A sample script prompt; includes three navigation buttons Next, Previous, More.
Figure 19	Speed Control	Another sample script prompt.
Figure 20	BEB Sales Manager	A screen brought up when the seller wants to close out the prospect record. Data fields marked by an asterisk are the minimum data that the seller should collect and record to be able to return to the main menu. The "beback" date and time fields indicate when the prospect has indicated s/he will return.
Figure 21		An example of a dialog box with a suggested script and three buttons for the seller to choose from. Includes two navigation buttons, Top and Previous, at the top right of the dialog box.

B) SOFTWARE - SCRIPT BUTTONS: Many of the screens have two rows of "buttons" at the top of the screen (with some buttons grayed out in some of the screens). Clicking on a button in the second row causes the handheld unit 200 / 110 to begin running a script for the corresponding phase or "step" of the sales presentation process as described in Table 2. An asterisk may be displayed in one of these step-related buttons to indicate that the seller has worked through enough of the script for the step in question that the step can be marked as complete. For example, in Figure 3, the GRT button has an asterisk to show that the Greeting step has been sufficiently completed.

The script (reproduced in Figures 22 through 70) prompts the user to say certain things to the prospect and to enter certain data at specific points in the sales presentation process; the data

entered are displayed on the screens described above. Many but not all of the three-letter codes for the scripts are the same as the three-letter codes for the screens listed in Table 1.

TABLE 2: SCRIPTS IN PROTOTYPE SELLER PROCESS

GRT	Greeting the prospect
WAN	Determining the prospect's wants
SEL	Selecting an actual vehicle
PRO	Product presentation (a detailed product-presentation script with prompts for discussion of features found in specific vehicles is in the file SCRIPT.RPT in the microfiche appendix).
DEM	Demo of a vehicle
TRA	Trade-in
SER	Service department (often user-defined to be specific to the dealership)
WRI	Write up the order (offers and counter-offers)
SOL	Update the information on the vehicle sold
DLR	Dealer-defined, e.g., "why should you buy your car here" information

The script, shown in Figures 22 through 70, can be thought of as a flowchart expressed in words. Each "line" of the script, referred to as a record, contains information as described in Table 3 below. Execution of the script by the handheld unit 200 / 110 causes a dialog box (see, e.g., the "Welcome to ABC Motors. How may I assist you today" dialog box shown in Figure 21) to be displayed "over" the screen that is currently being displayed (e.g., the Prospect Info screen shown in Figure 3).

10

TABLE 3: SCRIPT CONTENTS

SCRIPT TEXT	Text to be displayed in the dialog box to prompt the seller to say specific things to the prospect. For example, in Figure 27, at the script record labeled DEM 0100, the seller is prompted to say "Let me start the car, and I'll show you more about the interior of this vehicle."
ANSWER	The text of zero or more buttons, menu choices, etc., to be displayed as part of the dialog box so that, e.g., the seller can indicate the prospect's response to the SCRIPT TEXT. For example, in Figure 27, three potential answers are displayed: OK, No time, and Not buying.

TABLE 3: SCRIPT CONTENTS

GOTO	Indicates that, when this script record is executed, a different screen is to be displayed "under" the dialog box. For example, in Figure 36, script record SEL 0020 contains the entry SEL in the GOTO field. This indicates that when this record is executed by the handheld unit 200 / 110, the "Vehicle search" screen shown in Figure 9 (whose three-letter code is SEL) is displayed under the dialog box.
PUT DATA, FIELD	Specific data values to be entered in specific fields in the sales-information data store. For example, in Figure 38, if the seller clicks on the answer indicating that the prospect's trade-in is being financed by FMCC, then the value "FMCC" is assigned ("put") to the field TRADELIENNAM (trade-in lienholder name).
STEP, SEQ	The next record of the script to be executed (which can vary depending on which prospect response is selected). For example, in Figure 27, if the prospect's answer to "Let me start the car ..." is "OK," then the handheld unit 200 / 110 executes script record DEM 0140, which suggests that the seller "[t]ake the time to explain or review one or more of the interior features covered in the product presentation."
* (asterisk)	Indicates that, when the script record in question is completed, the entire "step" can be marked as complete. For example, in Figure 36, the "Y" entries in script records SEL 0020, 0030, and 0040 indicate that if any of these three records is executed, the entire Vehicle search step in the sales presentation process, whose three-letter code is SEL, can be marked as complete (see, e.g., the asterisk in the SEL button shown at the top of Figure 12).

C) SOFTWARE - OTHER BUTTONS: Referring to Figure 3 as an example, the top row of buttons includes the buttons Show Script; Close Prosp[ect], and Manager. The Show Script button causes the handheld unit 110 to resume running a script that was suspended by the seller (using a Hide Script button, not shown). The Close Prosp[ect] button signifies that the sales presentation has ended, either with or without a sale. The Manager button causes a signal to sent to summon a sales manager as described in Section 4.5(r) above.

D) SOURCE CODE: It will be appreciated by those of ordinary skill having the benefit of this disclosure that much more detail about the operation of the prototype can be found in the source code reproduced in the microfiche source code appendix. The code is written to be compiled with the Microsoft® Visual C++ compiler.

#### 4.7 Other Remarks

Use of the system described above helps management enforce the desired standardization of the sales process. The seller cannot advance through the prescribed sales process until he or she has completed all prior steps. In this way, management is assured that each prospect  
5 receives the treatment that has been deemed most effective in making a sale.

For example, the handheld unit 110 ordinarily allows the seller to retrieve and view sales information from the sales information data store for the benefit of the prospect (e.g., to determine whether a particular model is in stock). However, if the seller has not recorded the prospect's personal information such as name, address, and telephone number, the system will  
10 not allow the seller to retrieve that information. Thus, unless the seller follows the prescribed program, he or she is effectively prevented from proceeding. However, if the seller progresses through the prescribed steps, the handheld unit 110 may inform the sales management of each step completed successfully. In this way, management keeps abreast of which transactions have been dragging in critical stages, when management assistance might be useful.

15 The system provides other benefits besides adherence to the sales process. New sellers are easily trained on the job: once they learn to use the sales machine, it gives them a step-by-step script to follow, taking the guesswork out of the learning process.

Sellers are prompted through a thorough product presentation of features and benefits. These product presentations are specific to the product that the prospect desired to purchase and  
20 are tailored to address both the general and specific interests of the prospect.

Also, management now has an accurate picture of each seller's sales efficiency (ratio between number of sales completed per number of prospects seen). In a paper based system, sellers had a disincentive to record the visits of prospects who made no purchase, so management did not get any real idea of how well each seller was performing.

#### 4.7 Program Storage Device

As noted above, any of the foregoing variations may be implemented by programming a suitable general-purpose computer having appropriate hardware such as a microprocessor, memory, and a communications device such as a modem (preferably wireless for the handheld  
25

- 28 -

device 110). The programming may be accomplished through the use of a program storage device readable by the computer and encoding a program of instructions executable by the computer for performing the operations described above. The program storage device may take the form of, e.g., one or more floppy disks; a CD ROM or other optical disk; a magnetic tape; a  
5 read-only memory chip (ROM); and other forms of the kind well-known in the art or subsequently developed. The program of instructions may be "object code," i.e., in binary form that is executable more-or-less directly by the computer; in "source code" that requires compilation or interpretation before execution; or in some intermediate form such as partially compiled code. The precise forms of the program storage device and of the encoding of  
10 instructions are immaterial here.

\* \* \*

It will be apparent to those of ordinary skill having the benefit of this disclosure that numerous variations are possible from the illustrative embodiments described above. Accordingly, it is the claims below and not the illustrative embodiments that measure the  
15 exclusive rights claimed in the invention.

## WHAT IS CLAIMED IS:

1. A sales support computer comprising:
  - a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect; and
  - 5 b) means for prompting the seller to perform a specified sequence of steps in a desired sales communication process during a meeting with the prospect in response to the at least one particular interest of the prospect.
2. The sales support computer of claim 1 wherein the sales support computer is of a size  
10 suitable for the computer to be held in the seller's hand.
3. The sales support computer of claim 1 wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags,  
and anti-lock braking.
- 15 4. The sales support computer of claim 1 wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.
- 20 5. The sales support computer of claim 1, wherein the prompting to perform specified sequence of steps includes prompting the seller to say specific prospect-related information aloud.
6. The sales support computer of claim 5, wherein the specific prospect-related information  
25 comprises the prospect's name.
7. The sales support computer of claim 5, wherein the specific prospect-related information comprises information about a product option in which the prospect has indicated an interest.

- 30 -

8. The sales support computer of claim 5, wherein the specific prospect-related information comprises a recap list of information about product options in which the prospect has indicated an interest.
- 5 9. The sales support computer of claim 1, further comprising:  
c) means for prompting the seller with a script of product features and benefits.
10. The sales support computer of claim 1, further comprising:  
c) means for displaying a list of options available for a specific product.
- 10 11. The sales support computer of claim 1, further comprising:  
c) means for simultaneously displaying information about the availability of one or more specified options for two or more specific products.
- 15 12. The sales support computer of claim 1, further comprising:  
c) means for displaying a table of option availability for two or more specific products.
13. The sales support computer of claim 1, further comprising:  
20 c) means for summoning assistance for the seller.
14. The sales support computer of claim 1, further comprising:  
c) means for retrieving information from an external data store.
- 25 15. The sales support computer of claim 14, wherein the retrieved information comprises consumer credit information.
16. The sales support computer of claim 1, further comprising:



- c) means for retrieving and displaying sales information from a sales information data store; and
- d) means for preventing the seller from perceiving sales information from the sales information data store unless the seller records the prospect data.

5

17. The sales support computer of claim 1, further comprising:

- c) means for retrieving and displaying sales information from a sales information data store; and
- d) means for preventing the seller from perceiving sales information from the sales information data store if the seller does not comply with the desired sales communication process.

10

18. The sales support computer of claim 1, further comprising:

- c) means for accessing an external data store, and
- d) means for preventing the seller from retrieving information from the external data store if the seller does not comply with the desired sales communication process.

15

19. The sales support computer of claim 1, further comprising:

- c) means for recording the duration of performance of respective steps in the desired sale communication process.

20

20. The sales support computer of claim 19, wherein the means for recording the duration of performance of respective steps in the desired sales communication process comprises means for recording time stamps identifying the respective times of performance of the steps.

25

21. The sales support computer of claim 1, further comprising:

- c) means for transmitting a creditworthiness inquiry about the prospect to a financial institution, and

- 32 -

- d) means for receiving a creditworthiness report on the prospect.
22. The sales support computer of claim 21, further comprising:
- e) means for recording a representation of the prospect's signature, and
- 5 f) transmitting a representation of the prospect's signature to the financial institution.
23. The sales support computer of claim 1, further comprising:
- c) means for transmitting a sales offer and means for receiving a response to the offer.
- 10
24. The sales support computer of claim 1, further comprising:
- c) means for locally storing at least a portion of a sales information data store; and
- d) means for periodically updating said locally-stored portion.
- 15
25. A sales support computer comprising:
- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data, and (2) telling the prospect about a product option correlated with the prospect's particular interest; and
- 20 c) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.
- 25
26. The sales support computer of claim 25, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

27. The sales support computer of claim 25, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

8 28. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with the prospect's particular interest;
- 10 c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including:
  - (1) recording prospect data, and
  - 15 (2) telling the prospect about one or more features that are correlated with the prospect's particular interest; and
- d) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

29 29. The sales support computer of claim 28, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

30 30. The sales support computer of claim 28, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

- 34 -

31. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with the prospect's particular interest;
- c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including recording prospect data;
- d) means for recording the duration of performance of respective operations in the desired sales communication process; and
- e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

32. The sales support computer of claim 31, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

33. The sales support computer of claim 31, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

34. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said

- 35 -

operations including (1) recording prospect data and (2) telling the prospect about one or more product features suggested by one or more particular interests of the prospect; and

- d) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

35. The sales support computer of claim 34, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

36. The sales support computer of claim 34, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

37. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- c) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect;
- d) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features; and
- e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

- 36 -

38. The sales support computer of claim 37, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

5 39. The sales support computer of claim 37, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

40. The sales support computer of claim 37, further comprising means for summoning  
10 assistance for the seller.

41. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- 15 b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- c) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect;
- 20 d) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including recording prospect data;
- e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- 25 f) means for summoning assistance for the seller

42. The sales support computer of claim 41, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

5 43. The sales support computer of claim 41, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

44. A sales support computer comprising:

- 10 a) means for locally storing a copy of at least a portion of a sales information data store external to the sales support computer;
- b) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- 15 c) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- d) means for querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store, otherwise querying said locally-stored copy;
- 20 e) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features;
- 25 f) means for recording the duration of performance of respective operations in the desired sales communication process;
- g) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and

- 38 -

h) means for summoning assistance for the seller.

45. A sales support computer comprising:

- 5 a) means for locally storing a copy of at least a portion of a sales information data store external to the sales support computer;
- b) means for periodically updating said locally-stored copy;
- c) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- 10 d) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- e) means for determining the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store, otherwise querying said
- 15 locally-stored copy;
- f) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features;
- 20 g) means for recording the duration of performance of respective operations in the desired sales communication process;
- h) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- i) means for summoning assistance for the seller.

25 46. A sales support computer comprising:

- a) a processor;
- b) a pen-based user interface;
- c) a wireless communications interface;



- 39 -

- d) a data store;
  - e) a program store containing programming executable by the processor for carrying out operations including:
    - 1) downloading, via the wireless communications interface into the data store, a copy of at least a portion of a sales information data store external to the sales support computer;
    - 2) receiving, via the pen-based user interface, data inputted by a seller about a prospect, referred to as prospect data, including information about at least one particular interest of the prospect;
    - 3) querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store via the wireless communications interface, otherwise querying said locally-stored copy;
    - 4) prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect; and
    - 5) restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.
47. A portable sales support computer comprising:
- a) a processor;
  - b) a pen-based user interface;
  - c) a wireless communications interface;
  - d) a data store;
  - e) a program store containing programming executable by the processor for carrying out operations including:

- 40 -

- 1) downloading, via the wireless communications interface into the data store, a copy of at least a portion of a sales information data store external to the sales support computer;
- 2) receiving, via the pen-based user interface, data inputted by a seller about a prospect, referred to as prospect data, including information about at least one particular interest of the prospect;
- 3) querying a credit information data store via the wireless communications interface to get an indication of the prospect's creditworthiness;
- 4) querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store via the wireless communications interface, otherwise querying said locally-stored copy;
- 5) prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) inputting prospect data and (2) telling the prospect about at least one of said one or more features;
- 6) recording the duration of performance of respective operations in the desired sales communication process;
- 7) restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- 8) in response to a command inputted by the seller, transmitting via the wireless communications interface a signal summoning assistance for the seller

1/70

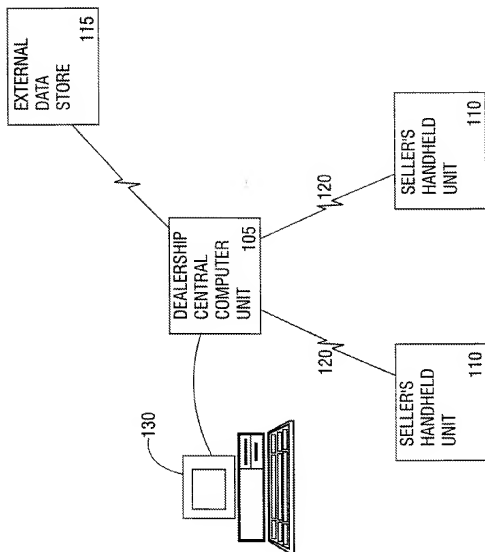


FIG. 1

2/70

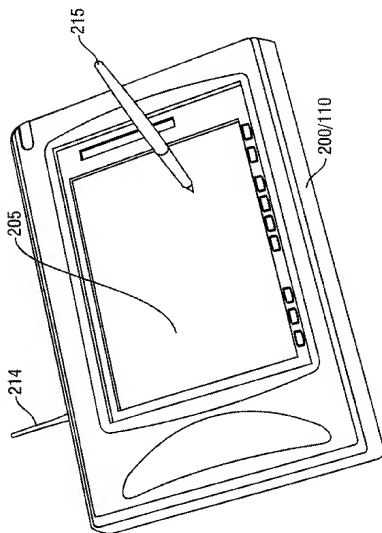


FIG. 2

3/70

Sales Manager										X	
Show script										Close prosp	
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL
Name										Title	
OLSEN, CATHERINE										Miss	
Address										Company	
[ ]										[ ]	
City										State	Zip
MISSOURI CITY										TX	77459
County										Country	
FORT BEND										United States	
Phones										Home	Work
[ ]										(713)660-7385	(800)999-6348
Extension										102	
Pager										Cel	Fax
[ ]										[ ]	(713)827-1200
Employer										THE CONTINUUM	
Occupation										PROGRAMMER	
Prospec Type										First time	Advertising source
[ ]										[ ]	SERV CUST
Prospect info										INF	
Prospect personal data										Co-buyer data	
[ ]										Prospect wants	
Trade-in										Trade-in appraisal	
Vehicle search										[ ]	
WAN 0:32										4:44	412496 Miss Catherine Olsen

FIG. 3

4/70

Sales Manager										X	
<input type="button" value="Show script"/> <input type="button" value="Close prosp"/>										Manager	
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL
<div> <div>Name</div> <div>OLSEN,CATHERINE</div> <div>SSN</div> </div> <div> <div>Nickname</div> <div>CATHY</div> <div>Driver lic</div> <div>102654852</div> <div>State</div> <div>TX</div> </div> <div> <div>Age</div> <div>25-39</div> <div>Birthday</div> <div>1/1/1961</div> <div>Homeowner</div> <div>Yes</div> <div>Class</div> <div>Woman</div> </div> <div> <div>Internet address</div> <div></div> </div> <div> <div>Spouse name</div> <div>MIKE</div> <div>Birthday</div> <div></div> <div>Spouse SSN</div> <div></div> </div> <div> <div>Hobbies</div> <div>BOATING, CAMPING, GARDENING</div> <div>Referred by</div> <div></div> </div> <div> <div>Children</div> <div>MIKEY</div> <div>10</div> <div></div> <div></div> <div></div> </div> <div> <div>Trade</div> <div>YES</div> <div>2A/2N</div> <div></div> <div>#PASS</div> <div></div> </div> <div> <div>Note</div> <div>WON'T MAKE DECISION WITHOUT SPUSE</div> </div>											
PER											
<input type="button" value="Prospect info"/> <input type="button" value="Prospect personal data"/> <input type="button" value="Go-buyer data"/> <input type="button" value="Prospect wants"/> <input type="button" value="Trade-in"/> <input type="button" value="Trade-in appraisal"/> <input type="button" value="Vehicle search"/>											
WAN 0:32		6:53		412496 Miss Catherine "Cathy" Olsen							

FIG. 4

5/70

Sales Manager												X
Show script		Show script										Manager
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL	
Name		OLSEN, MIKE		Title		Mr		SSN				
Address		12334 KIOWA RIVER										
City		MISSOURI CITY		State		TX		Zip		77459		
County		FORT BEND		Country		United States						
Phones		Home		(713)660-7385		Work				Extension		
Employer												
Occupation												
Driver lic.				State				Birthday				
Prospect info		Prospect personal data		Co-buyer data		Prospect wants		Trade-in		Trade-in appraisal		Vehicle search
WAN 0:32		8:04		412496 Miss Catherine "Cathy" Olsen								

FIG. 5

6/70

Sales Manager										X		
<input type="button" value="Show script"/> <input type="button" value="Close prosp"/>										<input type="button" value="Manager"/>		
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL	
New/Used		<input type="checkbox"/> New	Low year		<input type="text" value="1997"/>	High year		<input type="text" value="1997"/>	Car/Truck		<input type="text" value="Car"/>	
Make		<input type="text" value="FORD"/>		<input type="text"/>		Transmission		<input type="text"/>		Air cond.		<input type="text"/>
Series		<input type="text"/>		<input type="text"/>		Engine		<input type="text"/>		No. of cyl.		<input type="text"/>
Model #		<input type="text"/>		<input type="text"/>		Fuel type		<input type="text"/>		Age		<input type="text"/>
Vehicle Type		<input type="checkbox"/> Car <input type="checkbox"/> Sport Utility <input type="checkbox"/> Truck <input type="checkbox"/> Van		Seating capacity <input type="checkbox"/> 2 <input type="checkbox"/> 7 <input type="checkbox"/> 4 <input type="checkbox"/> 8 <input type="checkbox"/> 5 <input type="checkbox"/> 12 <input type="checkbox"/> 6		Body <input type="checkbox"/> 2 door <input type="checkbox"/> 3 door <input type="checkbox"/> 4 door <input type="checkbox"/> Convertible		Principal driver <input type="text" value="20,000"/> Mileage/year <input type="text" value="500"/> Budget/month <input type="text" value="1200"/> Downpmt		Business <input type="text"/>		
Class		<input type="checkbox"/> Luxury <input type="checkbox"/> Sport <input type="checkbox"/> Standard		Group <input type="checkbox"/> Full size <input type="checkbox"/> Mid size <input type="checkbox"/> Small		Drive <input type="checkbox"/> FWD <input type="checkbox"/> RWD <input type="checkbox"/> AWD <input type="checkbox"/> 4WD		WANTS 1 <input type="text" value="CD"/>		WANTS 2 <input type="text" value="LEATHER"/>		
						WANTS 2 <input type="text" value="ABS"/>				WANTS 2 <input type="text"/>		
Prospect info Prospect personal data Co-buys data Prospect wants Trade-in Trade-in appraisal Vehicle search WAN												
<input type="button" value="WAN 0:32"/>		<input type="button" value="10:31"/>		<input type="button" value="412496 Miss Catherine 'Cathy' Olsen"/>								

FIG. 6



7/70

Sales Manager												X		
Show script												Close prosp		
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL	Manager		
No trade? <input type="checkbox"/> VIN <input type="text"/> Mfg <input type="text"/> Year 1995 Make FORD Model TAURUS Series <input type="text"/> Body <input type="text"/> Color group <input type="text"/> Color <input type="text"/> Car/Truck Car Transmission AT Engine 6CY Condition GOOD Air cond. <input type="text"/> License TX 123765 No. of cyl. 6 Odometer 67000 Fuel type Unleaded Balance due 2500 to FMCC ACV 9000 Gross value 9000 TRA														
Prospect info / Prospect personal data / Co-buys data / Prospect wants / Trade-in / Trade-in appraisal / Vehicle search / S < >														
WAN 0:32		20:55		412496 Miss Catherine "Cathy" Olsen										

FIG. 7

8/70

Sales Manager												X			
Show script												Close prosp		Manager	
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL				
Print trade-in appraisal at station <input type="text"/>												Print			
Verbal request for trade appraisal made to <input type="text"/> THOMPSON															
Prospect info Prospect personal data Co-buys data Prospect wants Trade-in Trade-in appraisal Vehicle search														APP	
WAN 0:32		21:24		412496 Miss Catherine "Cathy" Olsen										<input type="text"/>	

FIG. 8

9/70

Sales Manager												X		
<input type="button" value="Show script"/> <input type="button" value="Close prosp"/>												Manager		
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL			

Attributes and Price/Payment												Options																															
<div> <div> New/Used <input type="text" value="New"/> </div> <div> Low year <input type="text" value="1997"/> </div> <div> High year <input type="text" value="1997"/> </div> <div> Make <input type="text" value="FORD"/> </div> <div> Make <input type="text" value="MUSTANG"/> </div> <div> Series <input type="text"/> </div> <div> Body <input type="text"/> </div> </div>												<div> <div> Vehicle Type <input type="checkbox"/> Car <input type="checkbox"/> Sport Utility <input type="checkbox"/> Truck <input type="checkbox"/> Van </div> <div> Class <input type="checkbox"/> Luxury <input type="checkbox"/> Sport <input type="checkbox"/> Standard </div> </div>										<div> <div> Seating capacity <input type="checkbox"/> 2 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 12 </div> <div> Group <input type="checkbox"/> Full size <input type="checkbox"/> Mid size <input type="checkbox"/> Small </div> </div>										<div> <div> Body <input type="checkbox"/> 2 door <input type="checkbox"/> 3 door <input type="checkbox"/> 4 door <input type="checkbox"/> Convertible </div> <div> Drive <input type="checkbox"/> FWD <input type="checkbox"/> RWD <input type="checkbox"/> AWD <input type="checkbox"/> 4WD </div> </div>										Payment from <input type="text" value="500"/> to <input type="text" value="500"/> Tier <input type="text" value="A"/> List price from <input type="text"/> to <input type="text"/>	

<input type="button" value="Search"/> <input type="button" value="Clear screen"/>		SEL	
---	--	-----	--

Prospect info		Prospect personal data		Co-buys data		Prospect wants		Trade-in		Trade-in appraisal		Vehicle search	
WAN 0:32		22:33		412496 Miss Catherine "Cathy" Olsen								<input type="button" value="S"/> <input type="button" value="V"/> <input type="button" value="D"/> <input type="button" value="P"/>	

FIG. 9

10/70

Sales Manager												X		
Show script   Close prosp   Manager														
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL			

Attributes and Price/Payment												Options			
New/Used		New		Color group				Color code				Trim			
Low year		1997		Transmission				Engine				Quick spec			
High year		1997		Include options											
Make		FORD													
Make		MUSTANG													
Series															
Body															
Exclude options															
Mileage from				to				Include statuses		OBDRF		Include on order			
Days in stock from				to				Spr#							

Search		Clear screen			
--------	--	--------------	--	--	--

SEL											
Prospect info   Prospect personal data   Co-buys data   Prospect wants   Trade-in   Trade-in appraisal   Vehicle search   S   <1 >											
WAN 0:32		22:47		412496 Miss Catherine "Cathy" Olsen							

FIG. 10

11/70

Vehicles found			
00031456	97 FORD	MUSTANG	2DR CNV
00031705	97 FORD	MUSTANG	2DR CNV
CJB00011	97 FORD	MUSTANG	2DR CPE GT
CJB00010	97 FORD	MUSTANG	2DR CPE GT

Vehicle: New 1997 FORD MUSTANG 2DR CNV 3 P44			
List: 23590	Calc: 23945	Cost:	Calc: 21752 Acct: 100
Mileage: 12	Spt#:	GW:	Whbse: 101.3
Color: RIO RED TINTED CLEARCOAT	Trim: SADDLE CLOTH BUCKETS		
Engine: ENGINE-3.8L EFI V6	Trans: AUTO OVERDRIVE TRANSMISSION		
Status: (R) READY TO SELL	In stock: 2	Location: FORD SALES	
Package: 243A	Options: 572 63A 143 217 132 994 44U M 12H 20A		

FIG. 11

12/70

Sales Manager												X
Show script												Manager
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL	
Description    1997 FORD MUSTANG    2DR CNV    ED Stock number    00031456    VIN    1FALP4443VF201267 List    23945    Price    23000												
Hold for salesman												
a Co-buys data    Prospect wants    Trade-in    Trade-in appraisal    Vehicle search    Selected vehicle    Credit Bureau Inquiry    P    <1    >												
WAN 0:32		4:44		412496 Miss Catherine Olsen								

FIG. 12

13/70

Sales Manager												X		
Show script Close prosp												Manager		
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL			
Bureau to be inquired: CBI Yes TRU Yes TRW No Auto print No Auto flush No														
Options: CBI: SSN Search Yes Phone code 5 Report options														
TRU: Phone code 3 Report options 012														
TRW: SSN Search No Phone code 2 Credit phone list No														
Last OLSEN First CATHERINE Middle														
Title SSN Employer THE CONTINUUM														
Joint inquiry No Spouse's first name MIKE SSN														
Current address: Number 12334 Street KIOWA RIVER														
City MISSOURI CITY State TX ZIP 77453 Route Box														
Former address: Number Street														
City State ZIP Route Box														
CBI Send														
a Co-buys data Prospect wants Trade-in Trade-in appraisal Vehicle search Selected vehicle Credit Bureau Inquiry														
WAN 0:32 24:00 412496 Miss Catherine "Cathy" Olsen														

FIG. 13

14/70

Sales Manager												X									
<input type="button" value="Show script"/> <input type="button" value="Close prosp"/>												Manager									
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL										
Stock number <input type="text" value="00031456"/>												1997		FORD		MUSTANG		2DR CNV		E8	
Customer Offer												Management Offer (display only)									
<input checked="" type="checkbox"/> 01-FINANCE <input checked="" type="checkbox"/> 01-LEASE												<input checked="" type="checkbox"/> 10-BALLOON <input checked="" type="checkbox"/> 01-FINANCE <input checked="" type="checkbox"/> CASH									
Price <input type="text" value="23000.00"/> Estimated Trade value <input type="text" value="9000.00"/> Down pmt <input type="text" value="1200.00"/> Trade payoff <input type="text" value="2500.00"/> Rebate <input type="text"/> Term <input type="text" value="43"/> APR <input type="text" value="10.00"/> Payment <input type="text"/> Balloon <input type="text"/> Submit to Power Workstation # <input type="text" value="W3J"/> Comment <input type="text"/>												Price <input type="text" value="23000.00"/> Estimated Trade value <input type="text" value="9000.00"/> Down pmt <input type="text" value="1200.00"/> Trade payoff <input type="text" value="2500.00"/> Rebate <input type="text"/> Term <input type="text" value="43"/> APR <input type="text" value="10.00"/> Payment <input type="text"/> Balloon <input type="text"/> Quote has been logged Buyer's Order <input type="text"/>									
Last activity: Counter-offer received												Comment									
<input type="button" value="Submit offer"/> <input type="button" value="Start over"/> <input type="button" value="Counter-offers"/>												OFF									
Trade-in Trade-in appraisal Vehicle search Credit Bureau Inquiry Prospect offer Sold Delivered /																					
WAN 0:32												27:34		412496 Miss Catherine "Cathy" Olsen							

FIG. 14



15/70

Sales Manager												X
<input type="button" value="Show script"/> <input type="button" value="Close prosp"/>												Manager
*GRT	WAN	SEL	PRO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL	
<div> <div>Name</div> <div>OLSEN, CATHERINE</div> </div> <div> <div>Prospect</div> <div>412496</div> </div> <div> <div>VIN</div> <div></div> </div> <div> <div>Stock</div> <div></div> </div> <div> <div>Description</div> <div></div> </div> <div> <div>This unit is sold</div> <div><input type="button" value="Yes"/></div> </div>												
<div> <div>s</div> <div>Trade-in</div> <div>Trade-in appraisal</div> <div>Vehicle search</div> <div>Selected vehicle</div> <div>Credit Bureau Inquiry</div> <div>Prospect offer</div> <div>Sold</div> <div>Delivered</div> </div>												SOL
<div> <div>WAN 0:36</div> <div>29:29</div> <div>412496 Miss Catherine "Cathy" Olsen</div> </div>												

FIG. 15

16/70

Sales Manager										X	
Show script										Close prosp	
*GRT	WAN	SEL	PHO	DEN	TRA	SER	WRI	CBI	SOL	DLR	DEL
Manager											
<p>Name <input type="text" value="OLSEN, CATHERINE"/></p> <p>Prospect <input type="text" value="412496"/></p> <p>VIN <input type="text"/></p> <p>Stock <input type="text"/></p> <p>Description <input type="text"/></p> <p>This unit is delivered <input type="text"/></p>											
S Trade-in										Trade-in appraisal	
Vehicle search										Selected vehicle	
Credit Bureau Inquiry										Prospect offer	
Sold										Delivered	
WAN 0:36										29:29	
412496 Miss Catherine "Cathy" Olsen										DEL	

FIG. 16

17/70

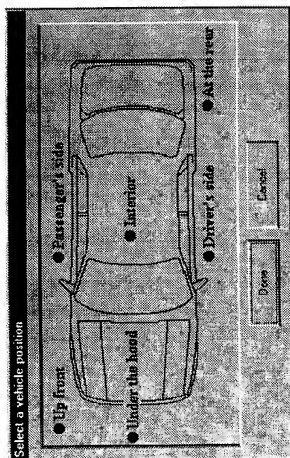


FIG. 17

18/70

Speed Control	Next	Previous	More?
Interior			
For relaxed highway cruising, this vehicle has Speed Control with convenient steering wheel-mounted controls.			

FIG. 18

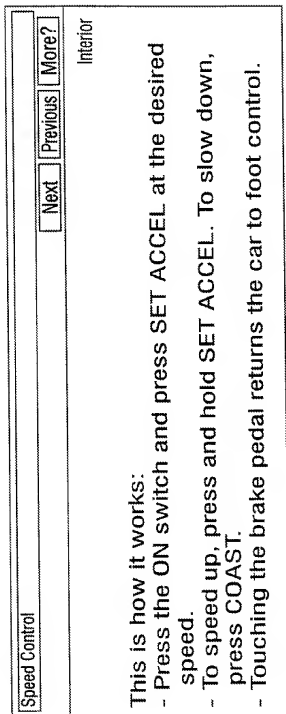


FIG. 19

20/70

Sales Manager		X	
Show script		Manager	

*Name	OLSEN, CATHERINE	
Phones	Home (713)660-7385	Work (800)999-6348
		Extension 102
Beback date		Time
*Tickle date	9/3/1997	Disposition
*Prospect type	First time	*Advertising source
		SERV CUST
*Up		

\* These are the minimum required fields necessary to close the prospect and return to the Main menu.

Main Menu Cancel

BEB

WAN 0:05	38:10	412496 Miss Catherine "Cathy" Olsen
----------	-------	-------------------------------------

FIG. 20

21/70

<a href="#">Top</a>		<a href="#">Previous</a>
Welcome to ABC Motors, How may i assist you today?		
<a href="#">We need a new car</a>	<a href="#">We're just looking</a>	<a href="#">How much is this car</a>

FIG. 21





PRINT 415 RECORDS - REPORT 022				RUN 09/10/99 15:35:40 PAGE- 3	
FILE NO	SCRIPT TEXT	ANSWER	GOTO PRT DATA	IN FIELD	STEP SEQ
001	010 When the Business manager has finished with your customers, you will receive a page asking you to come to his office. Take your customers to your office and complete the delivery process.	Continue			DEL 0010
001	010 Review contents of the New Vehicle Packet.				
001	010 Show your customer where the service write-up area is.	Continue			DEL 0015
001	010 Introduce your customer to a Service Advisor.				
001	010 Give him/her the scheduled maintenance book.				
001	010 Remind him/her of the three free LOE in the front of the book.				
001	010 Before introducing the Service Advisor, say: You will be assigned your own personal service advisor. This means that they get to know your customer and they ensure that you are completely satisfied on every visit.	Continue			DEL 0010
001	010 Tell the customer how convenient service's hours are: Our Service Department is convenient for both pick-up and drop-off customers. Service is open from 7:30am to 7:30pm, Monday through Friday, and by appointment on Saturday.	Continue			DEL 0015
001	010 Inspect the vehicle while filling out and reviewing the Ford Quality Commitment Delivery Checklist. Now say: In approximately two to three weeks you will receive a survey like this one from Ford Motor Company. The survey will ask you a few questions concerning your sales experience at Ford Motor Company.	Continue			DEL 0010
001	010 We take pride in our customer satisfaction rating. Your COMPLETE satisfaction is our Number 1 goal. Put me into Ford's Elite Masters Sales Program and part of my compensation is determined by your rating of "A", which rates your overall purchase/lease experience,	Continue			DEL 0010
001	010 and "N", which rates the overall condition of your vehicle at time of delivery.	TEN LESS THAN 10	10		DEL 0010
001	010 So you feel you can rate both those areas as	BUYERMS22	410		DEL 0010

FIG. 23

Complaintly satisfied			
13. 00 00	Turn the Dealer's Commitment Performance Checklist so they can see it, and say: "Great, I'll make a note of that."	Continue	DEL 01:00
14. 00 00	What can I do to direct the issue NOW, TODAY? I step carefully so what I do doesn't lead to say, "Take back if no money for it" if know you are paying attention.	Continue	DEL 01:00
15. 00 00	Good response to issues raised at delivery are: - "Let's get this off, I know he'll want to hear about this."	Continue - Cust. OK Talk to GM	DEL 00:01 DEL 00:01

LASTPAGE

FIG. 24



101	101	THANK YOU FOR SHOWING ME HOW YOUR VEHICLE FROM AER-MOTORS LOOKS LIKE ONLY THE BEGINNING OF OUR BUSINESS RELATIONSHIP.	Continue	DEL 0130
102	102	111 CALL YOU IN A TWO DAYS TO SEE IF YOU HAVE ANY QUESTIONS ABOUT YOUR NEW VEHICLE AND TO SEE HOW YOU LIKE YOUR NEW VEHICLE.	Continue	DEL 0130
103	103	121 NOW I HAVE A FEW THINGS TO SAYING THE SALE. AND YOUR CUSTOMER WILL BEGIN YOUR NEW SALE.	Continue	DEL 0130
104	104		REB	DEL 0130

FIG. 26

PRINT 415 RECORDS - REPORT 022		RUN 09/10/97 15:35:44 PAGE: 5	
LINE NO	LINE TEXT	ANSWER	GOTO PUT DATA IN FIELD STEP SEQ
0001	Let me start the car, and I'll show you more about the features of this vehicle.	OK No time Not buying	DEM 0140 DEM 0150 DEM 0160
0002	OK	OK No really, no time	DEM 0170 DEM 0180
0003	I understand that you're in a hurry. But for each car you'll find a better one, better feel for exactly what you want. So, really, and you will actually save time in selecting the vehicle you want.	Continue	DEM 0190
0004	OK	Continue	DEM 0190
0005	That's a smart way to shop for vehicles. Since you are not purchasing your search for a new vehicle, you will want to start parking a foot for what you like and don't like in the vehicle, the best way to do just that is to visit the car for a few minutes.	OK No	DEM 0190 DEM 0190
0006	OK	Continue	DEM 0190
0007	I'll be happy to help you. Or you may want to go to the car park and look at it again when you're ready to buy. Either way, you will have made up your mind on your decision making process.	Continue	DEM 0190
0008	OK	Continue	DEM 0190
0009	Let me take the time to explain or review one of more of the features that you've voted in the product presentation.	OK No time Not ready Not buying	DEM 0190 DEM 0190 DEM 0190 DEM 0190
0010	OK	OK No really, no time	DEM 0190 DEM 0190

FIG. 27

<pre> ----- TERMIN: Ready:   - becoming a little more familiar with this vehicle.   - understood how you feel.   - I have felt that way myself when I first began to search     for a new car.   - But I found that by driving each vehicle that interested     me, I was better able to define what I did and didn't     like and it actually made my search easier.   - OK. Let me try today. That's fine. Let me show you the     comfortable ride this vehicle offers. No one can make     you buy a vehicle just for test driving it. ----- </pre>	<pre> ----- OK Really, not ready ----- </pre>	<pre> ----- DEM 0200 DEM 0190 ----- </pre>
<pre> ----- TERMIN: Not trying today. That's fine. Let me show you the   - comfortable ride this vehicle offers. No one can make     you buy a vehicle just for test driving it. ----- </pre>	<pre> ----- OK No ----- </pre>	<pre> ----- DEM 0200 DEM 0190 ----- </pre>

FIG. 28



DEM 0230	Continue				
		See these trees on the edge of the lot? Mr. Jones planted those when he built this dealership back in 1965. We have a picture of the dealership back then, you can see how small the trees were. It's hard to believe we've been servicing people here at ABC Motors for over 40 years. Remind me to show you the picture when we get back.			
DEM 0240	Continue				
		What made you decide to look at this vehicle?	PER	LASTNOTE	
DEM 0250	Continue				
		Not on the demo drive, point out features the prospect has shown an interest in during the product presentation.			

FIG. 30





PRINT 415 RECORDS - REPORT 022					RUN 09/10/97 15:35:40 PAGE=	
LINE	SCRIPT TEXT	ANSWER	GOTO BUT DATA	IN FIELD	STEP SEQ	
01	KT 0015>Welcome to ABC Motors. How may I assist you today?	We need a new car We're just looking How much is this c			GRT 0300 GRT 0300 GRT 0105	
02	KT 0020 I'll be happy to get you a price on a car. So, is this the car you've decided is best?	Yes - the exact on No/undecided At the right price			GRT 0110 GRT 0120 GRT 0175	
03	KT 0025 Good. Now, if a company had a chance to test drive it?	Yes - here Yes - elsewhere No	B	PROSPTYPE	GRT 0130 GRT 0305 GRT 0170	
04	KT 0030 Well, that let's make sure it's the right car before we pass it on for you. Because if it's not the car you want, then it doesn't matter what the price is, right?	OK Just need a price			GRT 0300 GRT 0200	
05	KT 0035 Well, then let's make sure it's the right car before we pass it on for you. Because if it's not the car you want, then it doesn't matter how great the price is, right?	OK Just need a price			GRT 0300 GRT 0200	
06	KT 0040 Good, welcome back. So you've already had a chance to test drive the car.	Continue			GRT 1300	
07	KT 0045 Good, welcome back. So you've already had a chance to test drive the car.	Continue			GRT 1300	
08	KT 0050 Good, welcome back. So you've already had a chance to test drive the car.	Yes - First No - Serviced here No - Bought here No - Shopped here	F	PROSPTYPE PROSPTYPE PROSPTYPE PROSPTYPE	GRT 0310 GRT 0320 GRT 0320 GRT 0320	
09	KT 0055 Good, welcome back. So you've already had a chance to test drive the car.	Yes - First No - Serviced here No - Bought here No - Shopped here	F F B B	PROSPTYPE PROSPTYPE PROSPTYPE PROSPTYPE	GRT 0310 GRT 0320 GRT 0320 GRT 0320	
10	KT 0060 Good, welcome back. So you've already had a chance to test drive the car.	Yes - First No - Serviced here No - Bought here No - Shopped here	F F B B	PROSPTYPE PROSPTYPE PROSPTYPE PROSPTYPE	GRT 0310 GRT 0325 GRT 0325 GRT 0325	

FIG. 32

SC 2A	SOURCECODE SOURCECODE
Continue	GRT 1000
Continue	GRT 1000
Continue	GRT 1300
New	MANTRIMISED GRT 130.

FIG. 33

PRINT TST002

PRINT 415 RECORDS - REPORT 022

WO 99/14688

PAGE= 9

34 / 70

PCT/US98/19159

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
	Pre-Owned vehicles				
GR 1300	By the way, I'm...	Pre-Owned Undecided	U	WANTNEWSED	GRT 1300
GR 1301	What's your name? Do you mind if I write that down?	Continue		WANTNEWSED	GRT 1300
		Continue			GRT 1301
		Continue		BUYERNAME	GRT 1305
GR 1305	This computer is great. The owner, Mr. Jones, believes that every customer should be given our best treatment possible and has asked us to use it with each visitor. Is that OK with you?	OK			GRT 1310
		Continue			GRT 1320
GR 1310	Mr. Jones has also asked us to conduct a VERY SPECIAL survey to determine which advertising sources are most effective. Your answers are so important to us that he has asked us to log every response.	Continue			
GR 1310	First, which advertising source listed here BEST represents the reason you chose to visit our dealership?	Continue		SOURCECODE	GRT 1330
		Continue		BUYERZIP	GRT 1340
GR 1340	Thank you for taking a moment to answer these two questions.	Continue			GRT 1350
GR 1350	When you hit CONTINUE, this script will disappear. No more scripts will display until you: 1. Hit the NEW key if this is a new prospect. 2. Hit the SEARCH key if this person has been here before. 3. Hit the CANCEL key if you want to start over.	Continue			GRT 9999

FIG. 34

## STEP SEQ SCRIPT TEXT

ANSWER GOTO PUT DATA IN FIELD STEP SEQ \*

PRO 0010 I have one more question of you. It will help me understand your needs a little better. Which of the following items are most important to you in a vehicle?

Note: More than one answer may be selected. This screen will remain displayed until you hit 'NEXT/MORE'.

PRO 0011 Note: You have NINE choices. You may lock through all of the choices by using the 'Next' or 'Previous' buttons to move back and forth between the screens.

PRO 0012 Note: When you are done with your selections, hit 'Done'.  
Else hit 'Previous' for more choices.

Safety  
Performance/Mech  
Reliability  
Next/More Choices

Interior Room  
Economy  
Comfort/Convenience  
Next/More Choices

Style  
Side-Road  
Sound  
Done

MOTIVATION01 PRO 0030  
MOTIVATION02 PRO 0030  
MOTIVATION03 PRO 0030  
PRO 0031

MOTIVATION04 PRO 0031  
MOTIVATION05 PRO 0031  
MOTIVATION06 PRO 0031  
PRO 0032

MOTIVATION07 PRO 0032  
MOTIVATION08 PRO 0032  
MOTIVATION09 PRO 0032  
PRO 9999

36/70

CLMT TST002		PRINT 415 RECORDS - REPORT 022		RUN 09/10/97 15:35:40		PAGE= 11	
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO BUT DATA	IN FIELD	STEP SEQ		
SEL 0010	Note: What is our next step in SELECTING a vehicle? 1. Enter the stock number for the vehicle we've chosen. 2. I have a vehicle in mind to show, and want to see if it is available. 3. Use Vehicle Search to select a vehicle.	1. Enter Stock# 2. Check Vehicle 3. Vehicle Search			SEL 0020 SEL 0030 SEL 0040 T3S		
SEL 0020	Enter the STOCK# of the vehicle. It is displayed on the upper right hand corner of the BAA code sticker on the windshield. The system will accept the STOCK# when you hit CONTINUE if the vehicle is available for sale.	Continue		T3S	SEL 9999 Y		
SEL 0030	Walk over to the vehicle you have in mind, and enter the STOCK#. The system will accept the STOCK# if the vehicle is available.	Continue		UNITLISTSTOCKNO	SEL 9999 Y		
SEL 0040	1. When you hit CONTINUE, the Vehicle Search screen will be displayed. The entries you have made regarding the prospect's wants should already be on the screen. 2. You may make further entries or you may hit RETURN. 3. After you select the vehicle you entered, click on the PRO button to begin the Product Presentation.	Continue		UNITLISTSTOCKNO	SEL 9999 Y		

FIG. 36

37/70

CLINT TEST002						PRINT 415 RECORDS - REPORT 022						RUN 09/10/97 15:35:40 PAGE= 12					
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	PUT DATA	IN FIELD	STEP SEQ											
TRA 0005	Before we go in....	Continue				TRA 0010											
TRA 0010	May we make you an offer on your trade-in?	Yes	YES	BUYERMISC1	TRA 0040												
		No	NO	BUYERMISC1	TRA 0020												
		Not sure	NOT SURE	BUYERMISC1	TRA 0020												
TRA 0020	Naturally you are not required to accept our offer if you don't think it's fair, but at least you will get an idea of what DEALERS WILL PAY for your vehicle in the Houston market. Also, don't forget that applying your trade against the purchase price of the vehicle saves you money in TAXES.	Okay			TRA 0040												
		No			TRA 0030												
TRA 0010	I understand your feelings. Let's get you the figures on your new car. Right this way.	Continue			TRA 9999												
TRA 0040	Let me collect some data about your vehicle and then tell you what the Used Vehicle Buyer is going to look at when he evaluates your trade.	Continue			TRA 0040												
TRA 0050	What is the LICENSE plate number?	Continue	TX	TRADESTATE TRADELICENSE	TRA 0051												
TRA 0051	What is the LICENSE STATE?	Continue			TRA 0060												
TRA 0060	What is the ODOMETER?	Continue	AT	TRADETRANS TRADEMILEAGE	TRA 0070												
TRA 0070	Is this an automatic?	Continue			TRA 0080												
TRA 0080	What COLOR is it?	Continue		TRADETRANS	TRA 0100												
TRA 0100	Enter the VIN:	Continue		TRADECOLGRP TRADEVINNUM	TRA 0110												

FIG. 37

38/70

TRA 0110 Ask: Do you owe anything on your trade?	Yes No Yes, but \$\$ unknow	TRA 0130 TRA 0140 TRA 0120
-----		
TRA 0120 That's okay. We can get that information later.	Continue	TRA 0130
TRA 0130 Ask: To whom do you owe the outstanding balance?	PMCC Wells Fargo First Security Other	TRADELIENNAM TRA 0140 TRADELIENNAM TRA 0140 First Secu TRADELIENNAM TRA 0140 TRA 0131
TRA 0131 Ask: To whom do you owe the outstanding balance?	Continue	TRA 0140

FIG. 38



39/70

CLNT TEST002	PRINT 415 RECORDS - REPORT 022	ANSHNER	GOTO PUT DATA	IN FIELD	STEP SEQ	PAGE= 13
STEP SEQ	SCRIPT TEXT					
TRA 0140	Okay, let me tell you how the Used Vehicle Buyer will evaluate on your trade, so you'll have a good idea of the process he uses.	Continue			TRA 0150	
TRA 0150	First he checks the BODY for damage. This includes the Top, Hood, Fenders, Doors, Deck lid, Bumper, Grill, Paint, and Glass.	Continue			TRA 0160	
TRA 0160	Next he checks the DRIVE TRAIN. This includes examining the engine and transmission, the alternator, battery and cables, starter, pump and compressor, radiator, hoses and belts, emission control, clutch, U joints, differential and exhaust system.	Continue			TRA 0170	
TRA 0170	Third he checks the RUNNING GEAR. This includes looking at each tire for wear, examining the wheels, caps and brakes. He'll look at the wheel alignment, whether the tires have been rotated properly, the steering adjustment, springs, shocks and the front end.	Continue			TRA 0180	
TRA 0180	Finally, he looks over the interior. He looks at the upholstery, mats and carpet, A/C and heater, radio - tape - antenna, headliner, seats, windows, sun roof, windshield wiper and washer, instruments, horn lights - signals - lenses, tire jack and spare, and tools.	Continue			TRA 0190	
TRA 0190	The reason I go into such detail on how we appraise your trade is this, we want to give you a fair price. We also want you to understand what we evaluate to make up that fair price. It includes excess mileage, wear and tear, and repairs necessary for us to turn around and sell the car to another customer like you.	Continue			TRA 0200	
TRA 0200	Based on your experience with this vehicle, and what I've told you so far, how would you rate the CONDITION of this vehicle? You are not required to answer this question.	POOR (wholesale) FAIR (major recond) GOOD (recondition)	POOR FAIR GOOD	TRADESECOND TRADESECOND TRADESECOND	TRA 0240 TRA 0240 TRA 0240	

FIG. 39

40/70

EXC (retail as is)	EXC	TRAUCOND	TRA	TRA
TRA 0240 Okay, that'll do it.			TRA 0240	
	Continue		TRA 0250	
TRA 0250 I will turn in your vehicle information to our Used Vehicle Buyer and he will give us the Houston market value on the car. Will you loan me the keys for a few minutes?	Continue		TRA 9999 Y	

FIG. 40

41/70

CLINT TEST02	PRINT 415 RECORDS - REPORT 022	RUN 09/10/97 15:35:40	PAGE= 14
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA IN FIELD STEP SEQ
U01 0010	Let's walk this way. Back here in service we have six SERVICE ADVISORS with a combined total of over 75 years experience in the dealership service industry. The plaques you are awarded and the office are for the awards they've won.	Continue	U01 0020
U01 0020	Every person who works in this dealership takes an annual course on what we call the CUSTOMER-FOR-LIFE philosophy. Have you heard of it?	Yes No	U01 0025 U01 0030
U01 0025	Well then you already know that...	Continue	U01 0030
U01 0030	The CUSTOMER-FOR-LIFE philosophy means we don't just sell you one vehicle and then never see you again. We want to follow up to make sure you are satisfied with the vehicle and with our service. We try to build a relationship with you so that you will want to come back to us.	Continue	U01 0045
U01 0045	This is our LUBE, OIL, FILTER center. We reconstructed it last year and have a 27 minute guarantee on getting you in and out, or your LOF is free. As you can see, you can also view the activities of the LOF center from the customer lounge.	Continue	U01 0050
U01 0050	Here is our CUSTOMER LOUNGE. As you see it is equipped with comfortable seating, fax machine, coffee, and vending machines for your use if you choose to wait for your vehicle while it is serviced.	Continue	U01 0060
U01 0060	We also have a SHUTTLE SERVICE in the mornings so you can drop your vehicle off and then go to work without waiting on your vehicle.	Continue	U01 0070
U01 0070	This is our CASHIER.	Continue	U01 0080
U01 0080	Let's go through this door to get to the front area. Now down this hallway is the picture of the dealership back in	Continue	U01 0090

FIG. 41

42/70

in 1955. We also post some of the nice letters customers  
have written us on our Wall of Fame.  
Now let's go get you those figures.  
0090 The water fountain and the restrooms are down that hall  
001 If you need them. May I offer you a coke?  
Continue  
U01 9999 Y

FIG. 42

STEP SEQ PRINTER TEXT

001 0010 WHY TRY FROM ABC Motors?

002 0020 One of the following reasons for buying at ABC Motors: "Dealer Selling"

003 0030 These are the following reasons for buying at ABC Motors (cont'd): "Dealer Selling"

004 0040 These are the following reasons for buying at ABC Motors (cont'd): "Dealer Selling"

005 0050 "No Problem" Philosophy:  
For over 40 years, ABC Motors has had one simple goal, to exceed our customers' expectations. Our "No Problem" Philosophy is the key to why we have been successful. We all carry it. Our mission statement is on a card that we all carry. It was developed and approved by the very best employees that we have here at ABC Motors.

006 0060 Mission Statement:  
We at ABC Motors are fully committed to providing an automotive experience that exceeds our customers' expectations.

007 0070 Mission Statement (cont'd):  
Our emphasis on teamwork, combined with a high level of dedication and integrity, further define this commitment to excellence.

ANSWER GOTO PUT DATA IN FIELD STEP SEQ

Dealer  
Inventory  
Parts and Service  
Rental  
002 0020  
002 0200  
002 0400  
002 0500

"No Problem" Philo  
Mission Statement  
#1 Ford Volume  
More  
002 0030 Y  
002 0040 Y  
002 0050 Y  
002 0060 Y

Top 100 Club  
#1 Jeep Volume  
#1 Dodge Club  
More  
002 0060 Y  
002 0070 Y  
002 0080 Y  
002 0090 Y

Top Hyundai Volume  
Customer Loaners  
Main Menu  
End  
002 0090 Y  
002 0100 Y  
002 0010 Y  
002 9999

More  
Previous Menu  
Main Menu  
End  
002 0040  
002 0020  
002 0010  
002 9999

Continue  
002 0045

More  
Previous Menu  
Main Menu  
End  
002 0050  
002 0020  
002 0010  
002 9999

FIG. 43



45/70

```

-----
U02 0206 As you can expect, we are determined to maintain our
      volume leadership, and therefore will bend over backwards
      backwards to ensure that you are completely satisfied
      with anything that we do to serve your needs.
      U02 0206 Choices cont'd. New Cars and Trucks.
      -----
      U02 0210 New Cars and Trucks - Great leasing/financing:
      Our leasing and financing programs are the best available.
      Our #1 volume status ensures that we have the most
      -----
      Great Leasing/Fin
      Great Leasing/Fin
      Great Leasing/Fin
      Great Leasing/Fin
      Note
      Main Menu
      End
      -----
      Continue Menu
      Previous Menu
      Main Menu
      End
      -----
      U02 0210 Y
      U02 0220 Y
      U02 0230 Y
      U02 0240 Y
      U02 0250 Y
      U02 0260 Y
      U02 0010
      U02 9999
      U02 0220
      U02 0200
      U02 0010
      U02 9999
    
```

FIG. 45

46/70

CLINT TFF002	PRINT 415 RECORDS - REPORT 022	RUN 09/10/97 15:35:49	PAGE- 16
STEP SEQ	SCRIPT TEXT	AUNSER	GOTO PUT DATA IN FIELD
U02 0070	U1 Jeep Volume: We know we've been successful because.... More people buy a Jeep from us than any of the other 85 Jeep dealerships in the Texas region. We've been the top Jeep dealership for the past 2 years: 1994 and 1995.	More Previous Menu Main Menu End	U02 0090 U02 0020 U02 0010 U02 9999
U02 0080	Eagles Club: We know we've been successful because.... We're also a member of the prestigious Eagles club, a national award from Chevrolet for dealers who achieve outstanding volume with outstanding customer satisfaction.	More Previous Menu Main Menu End	U02 0090 U02 0020 U02 0010 U02 9999
U02 0090	Top Hyundai Volume: We know we've been successful because.... We are also a top Hyundai dealership with excellent satisfaction scores.	More Previous Menu Main Menu End	U02 0100 U02 0020 U02 0010 U02 9999
U02 0100	Customer Loaners: We know we've been successful because.... our Service Department is also top-notch. In addition to top caliber technicians and equipment, we also have our customer Loaner Program available for a small fee. This exclusive program is available only at ABC Motors.	Continue	U02 0105
U02 0105	Customer Loaners: (cont'd) provides a free rental car any time that your vehicle is in for repairs -or- maintenance, as well as giving you free TX state inspection.	More Previous Menu Main Menu End	U02 0110 U02 0020 U02 0010 U02 9999
U02 0110	We look forward to welcoming you into our family of completely satisfied customers. We are #1 for a lot of very good reasons. Experience the ABC Motors difference.	Continue Previous Menu Main Menu End	U02 0200 U02 0020 U02 0010 U02 9999
U02 0200	Choose one of the following categories for buying at ABC Motors. "Inventory Stories"	New Cars and Trucks Used Cars and Trucks Main Menu End	U02 0205 U02 0300 U02 0010 U02 9999

FIG. 46



47/70

CLINT TST002	PRINT 415 RECORDS - REPORT 022	RUN 09/10/97 15:35:40	PAGE= 17	
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA IN FIELD	STEP SEQ
competitive programs available for our customers.				
U02 0220	New Cars and Trucks - Over 1,000 vehicles:	Continue		U02 0230
	Being the largest also means that our selection of new cars and trucks is the best around. At any point in time, we have over 1,000 new vehicles available for you to select from... this means the right vehicle for you, ready to take home with you today.	Previous Menu		U02 0200
		Main Menu		U02 0010
		End		U02 9999
U02 0230	New Cars and Trucks - Great Pricing:	Continue		U02 0240
	And, of course, no one can sell as many cars and trucks as we do, without having great pricing. This combination of price and selection is just not available anywhere else in the region.	Previous Menu		U02 0200
		Main Menu		U02 0010
		End		U02 9999
U02 0240	ABC Motors is, therefore, the only place to buy your new car or truck. Be part of our family of completely satisfied new vehicle owners.	Continue		U02 0300
		Previous Menu		U02 0200
		Main Menu		U02 0010
		End		U02 9999
U02 0300	At ABC Motors, our reputation is at stake every time we sell a used car or truck. For years our customers have come to us expecting the finest in sales and service, and we've gone to extraordinary measures to ensure that every vehicle on the lot meets their expectations.	200 to choose from		U02 0310 Y
		Proud to sell		U02 0320 Y
		Thorough reconditi		U02 0330 Y
		More		U02 0301
U02 0301	More choices (cont'd). Used Cars and Trucks.	3 Month / 3,000 Mi		U02 0340 Y
		Financed on the Sp		U02 0350 Y
		Main Menu		U02 0010
		End		U02 9999
U02 0310	Used Cars and Trucks - 200 to choose from:	Continue		U02 0320
	We usually carry at least \$1 million in late model, low mileage vehicles. This represents around 200 premium cars and trucks at any one time. Since we sell more new Ford's and new Jeep's than anyone else in the Texas region, and	Previous Menu		U02 0300
		Main Menu		U02 0010
		End		U02 9999

FIG. 47

48/70

are a top Hyundai dealership as well. We have our pick of a huge volume of vehicles for resale on our lot.

U02 0320 Used Cars and Trucks - Proud to sell:

This also means that we can be very choosy about what we offer, and we are. Any vehicles that we wouldn't be proud to sell, we simply sell to the wholesalers, who then re-sell to other lots.

U02 0330 Used Cars and Trucks - Thoroughly recondition:

We thoroughly recondition AND clean every hand-picked used

Continue

Previous Menu

Main Menu

End

U02 0330

U02 0300

U02 0010

U02 9999

Continue

Previous Menu

Main Menu

U02 0340

U02 0300

U02 0010

FIG. 48

49/70

CLINT TST002	PRINT 415 RECORDS - REPORT 002	RUN 09/10/97 15:35:40	PAGE= 18
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA IN FIELD STEP SEQ *
U02 0300	car and truck that we sell, following an extensive mechanical, electrical, and cosmetic checklist.	End	U02 9999
U02 0340	Used Cars and Trucks - 3 month / 3,000 mile: Each used vehicle is backed by a 3 month / 3,000 mile guarantee. Since our vehicles are so good, extended service plans are available for even longer periods of time.	Continue Previous Menu Main Menu End	U02 0350 U02 0300 U02 0010 U02 9999
U02 0350	Used Cars and Trucks - Financing on the spot: Financing is available right on the spot at very competitive terms, and we even have great lease programs if you want the lowest payment possible.	Continue Previous Menu Main Menu End	U02 0360 U02 0300 U02 0010 U02 9999
U02 0360	If you are thinking of a quality pre-owned vehicle, see what impressive quality really means in a used car or truck. We look forward to welcoming you into our family of completely satisfied customers. We are #1 for a lot of very good reasons. Experience the McCafferty difference.	Continue Previous Menu Main Menu End	U02 0400 U02 0300 U02 0010 U02 9999
U02 0400	Choose one of the following reasons for buying at ABC Motors. Service and Parts:	Convenient Personal Advisor State-of-the-art More	U02 0410 Y U02 0420 Y U02 0430 Y U02 0401
U02 0401	Choose one of the following reasons for buying at ABC Motors. Service and Parts: (cont'd)	Saves Money Accurate Repairs "Do it right" More	U02 0440 Y U02 0450 Y U02 0460 Y U02 0402
U02 0402	Choose one of the following reasons for buying at ABC Motors. Service and Parts: (cont'd)	Main Menu End	U02 0010 U02 9999
U02 0410	Service and Parts - Convenient:	Continue	U02 0420

FIG. 49

```

-----
Our Service Department is convenient for both pick-up and
drop-off customers. Service is open from 7:30am to 7:30pm,
Monday through Friday, and by appointment on Saturday.
-----
WO2 0420 Service and Parts - Personal Advisor:
-----
You will be assigned your own personal service advisor.
This means that they get to know your vehicles, and they
ensure that you are completely satisfied on every visit.
-----
WO2 0430 Service and Parts - State-of-the-art:
-----
-----
Previous Menu
Main Menu
End
-----
Continue Menu
Previous Menu
Main Menu
End
-----
Continue
Previous Menu
-----
U02 0400
U02 0010
U02 9999
-----
U02 0430
U02 0460
U02 0010
U02 9999
-----
U02 0440
U02 0400
-----

```

FIG. 50

## STEP 410 SCRIPT TEXT

GOTO PUT DATA IN FIELD STEP SEQ \*

ANSWER

Main Menu

End

002 0010

002 9999

Our factory-trained technicians always work with the latest state-of-the-art equipment.

002 0440 Service and Parts - Saves Money:

This means accurate diagnostics, and efficient repair methods that save you valuable time and money.

002 0450 Service and Parts - Accurate Repairs:

We have over 40 service technicians and a HUGE inventory of parts available for every level of repair. This means prompt and accurate handling of any service needs that you have.

002 0460 Service and Parts - "Do It Right":

This caring attention to your service needs is a tradition that we've maintained since our founding in 1955, and is one of our primary reasons for our success over 40 years. We are dedicated to the "do it right the first time, every time" philosophy.

002 0470 We look forward to your visit. We are devoted to your complete satisfaction.

002 0500 Choose one of the following reasons for buying at

ABC Motors.

We take our Rental Department very seriously. If your impression of dealership rental departments is that they aren't REALLY in the business, prepare for us to exceed your expectations.

002 0510 Choose one of the following reasons for buying at ABC Motors. (cont'd)

Top Choice

Main Menu

002 0540 Y

002 0010



PRINT 415 RECORDS - REPORT 022				RUN 09/10/97 15:35:40		PAGE= 20	
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ		
002 0520	Rental - Competitive Rates: We have very competitive rates. Deeply discounted weekly and monthly rates are also available for your convenience.	Continue Previous Menu Main Menu End			002 0530 002 0500 002 0010 002 9999		
002 0530	Rental - Convenient: We are open the same hours as the dealership, offering very convenient pick-up and drop-off, early in the morning or late in the evening.	Continue Previous Menu Main Menu End			002 0540 002 0500 002 0010 002 9999		
002 0540	Rental - Top Choice: If you need short term transportation, ABC Motors is your top choice.	Continue Previous Menu Main Menu End			002 0550 002 0500 002 0010 002 9999		
002 0550	We are dedicated to your complete satisfaction.	Previous Menu Main Menu End			002 0600 002 0010 002 9999		

53 / 70

FIG. 53

CINT TST602      PRINT 415 RECORDS - REPORT 022      RUN 09/10/97 15:35:40      PAGE= 21

STEP SEQ	SCRIPT TEXT	ANSWER	QOTO RUT DATA	IN FIELD	STEP SEQ
WAN 1370	Do you mind if I ask you a few questions about your automotive needs?	Go ahead			WAN 1400
	What we can do is full out the questions together on this computer, then we'll have a better idea of what you want.	No			WAN 1380
	WAN 1370 I have found that by getting all of this down on the computer, I gain a better sense of your needs. Plus, we'll easily be able to pull it back up should you return to us or call back at a later date. So, will it be all right if I ask you a few questions?	Yes			WAN 1400
	WAN 1340 I have found that by better learning what your needs are, we can SAVE TOO TIME in finding the perfect vehicle. Plus, by making one of your needs, you won't have to spend time asking what you need when you call or return at a later date. So will it be all right if I ask a few questions?	No			WAN 1360
	WAN 1370 That's fine. I respect your wishes.	Yes			SEL 9999
	Do you have any questions that I can answer?	No			WAN 1380
	WAN 1360 Well, my name is... If you need any assistance I'll be standing out in front of the showroom, please don't hesitate to call out to me. Also, here's my card if you decide you have questions about our inventory when you get home.	Continue			SEL 9999
	WAN 1400 Do you already have a particular vehicle in mind?	Right here			
		Yes			WAN 1405
		No			WAN 1450
		Continue			WAN 1410
	WAN 1405 Great, let me enter the stock number and vehicle information.				
	WAN 1410 Is the vehicle new or used?				
		New			UNIT1STOCKNO
					N
					MAINTENISED
					WAN 1415

FIG. 54



Used	U	MANTRUSED	MAN	1415
	FORD	MANTRUSED	MAN	1415
MAN 1415 What is the make of the vehicle you are entering?		MANTRUSED	MAN	1415
		MANTRUSED	MAN	1415
MAN 1420 Is the vehicle a Car or a Truck?		MANTRUSED	MAN	1420
		MANTRUSED	MAN	1420
MAN 1425 What year is the vehicle?		MANTRUSED	MAN	1425
		MANTRUSED	MAN	1425
MAN 1450 Are you interested in a New Ford product or a		MANTRUSED	MAN	1450
		MANTRUSED	MAN	1450

FIG. 55



Drive?

WAN 1550 Would you be interested in TRADING that vehicle in to  
our dealership?

WAN 1600 What one feature do you most like about your current  
vehicle and really WANT on your new vehicle?  
(Such as 4WD, Nice Stereo, CD, power seats, alarm,  
leather, fuel economy).

Enter WANT 1:

TRADEMODEL	YES	NO	NOT SURE	WANT
BUYERMISC1	YES	NO	NOT SURE	WAN 1600
BUYERMISC2	NO	NOT SURE	YES	WAN 1600
BUYERMISC3	NOT SURE	YES	NO	WAN 1600
BUYERMISC4	YES	NO	NOT SURE	WAN 1610

FIG. 57

CLINT #ST002	PRINT 415 RECORDS - REPORT 022	RUN 09/10/97 15:45:40	PAGE= 23
STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA IN FIELD STEP SEQ
WAN 1610	What second feature do you most like about your current vehicle? And really WANT on your new vehicle? (Such as 4WD, Rice Stereo, CD, power seats, alarm, leather, fuel economy).	Continue	WAN 1620
Enter WANT 2:			WANTMISC2
WAN 1620	What one feature have you never had but really want to have on your new vehicle?	Continue	WAN 1730
Enter WANT 3:			WANTMISC3
WAN 1730	Will this vehicle be for personal use or business use?	Personal Business N Y	WAN 1800 BUSINESSUSE WAN 1740 BUSINESSUSE
WAN 1740	What line of business are you in?	Continue Why?	WAN 1900 WAN 1741 BUYERTITLEOC
WAN 1741	It's helpful to know if you'll be making deliveries such as flowers, or making purchases such as antiques, or sell a product which need you need to carry around, or carry clients to business appointments, or to work a ranch.	OK No Info Given	WAN 1900 WAN 1800
WAN 1800	Have you set your MONTHLY budget yet?	Yes Don't know	WAN 1810 WAN 1810
WAN 1810	Do any of these monthly figures come close to what you had in mind?	350 400 450 More Choices	WAN 1900 BUDGET WAN 1800 BUDGET WAN 1830
WAN 1830	Write in your budgeted monthly payment.	Continue Don't know yet	WAN 1900 WAN 1840 BUDGET

58 / 70

FIG. 58

```

WAN 1840 That's okay. I can help you figure that out later if you
like.
-----
WAN 1900 Last question, do you have a color preference?
-----
WAN 2000
-----
WAN 2100
-----
WAN 2200 Based on the information you've provided me, I have
a vehicle (or several vehicles) in mind which I believe
will meet your needs.
-----
WAN 2300
-----
WAN 2400
-----
WAN 2500
-----
WAN 2600
-----
WAN 2700
-----
WAN 2800
-----
WAN 2900
-----
WAN 3000
-----
WAN 3100
-----
WAN 3200
-----
WAN 3300
-----
WAN 3400
-----
WAN 3500
-----
WAN 3600
-----
WAN 3700
-----
WAN 3800
-----
WAN 3900
-----
WAN 4000
-----
WAN 4100
-----
WAN 4200
-----
WAN 4300
-----
WAN 4400
-----
WAN 4500
-----
WAN 4600
-----
WAN 4700
-----
WAN 4800
-----
WAN 4900
-----
WAN 5000
-----
WAN 5100
-----
WAN 5200
-----
WAN 5300
-----
WAN 5400
-----
WAN 5500
-----
WAN 5600
-----
WAN 5700
-----
WAN 5800
-----
WAN 5900
-----
WAN 6000
-----
WAN 6100
-----
WAN 6200
-----
WAN 6300
-----
WAN 6400
-----
WAN 6500
-----
WAN 6600
-----
WAN 6700
-----
WAN 6800
-----
WAN 6900
-----
WAN 7000
-----
WAN 7100
-----
WAN 7200
-----
WAN 7300
-----
WAN 7400
-----
WAN 7500
-----
WAN 7600
-----
WAN 7700
-----
WAN 7800
-----
WAN 7900
-----
WAN 8000
-----
WAN 8100
-----
WAN 8200
-----
WAN 8300
-----
WAN 8400
-----
WAN 8500
-----
WAN 8600
-----
WAN 8700
-----
WAN 8800
-----
WAN 8900
-----
WAN 9000
-----
WAN 9100
-----
WAN 9200
-----
WAN 9300
-----
WAN 9400
-----
WAN 9500
-----
WAN 9600
-----
WAN 9700
-----
WAN 9800
-----
WAN 9900
-----

```

FIG. 59

```

PRINT TITL2          PRINT 415 RECORDS - REPORT 022          RUN 09/10/97 15:35:40 PAGE- 24
STEP SEQ  SCRIPT TEXT:  ANSWER      GOTO RUN DATA  IN FIELD  STEP SEQ
-----
WRI 0010 After seating your prospects, offer them some
      refreshments if you haven't already done so.
      Folks, can I get you a refreshment? How about some coffee
      or a coke?
-----
WRI 0020 Read through the following screens as a refresher of what
      to do next, then hit HIDE SCRIPT and turn the computer so
      you both can see the screen. Use the Prospect Offer screen
      to enter the info.
-----
WRI 0030 Okay, let's enter the numbers in the computer. The selling
      price is _____. The Houston area market value on your
      trade-in is _____. With $1000 down, let's see what your
      payment will be. You will now have to hit SUBMIT OFFER.
      We'll have to wait a moment while the computer calculates
      the payment.
-----
WRI 0040 Okay, the vehicle is available, and the payments are
      calculated.
      - For a 48 month lease, your payment would be _____.
      - For a 24 month lease, your payment would be _____.
      Which would you prefer?
-----
WRI 0050 Ford is able to offer such a low lease payment because you
      are only paying for the portion of the vehicle you are
      leasing. We take the price of the vehicle today and subtract
      the guaranteed value of the vehicle at the end of the
      lease. This is the amount of the vehicle you are "using",
      and we finance this over a 24 or 36 month period.
-----
WRI 0060 Click on the quote the prospect is most interested in.
-----
WRI 0070 All we need is your OK right here and we can get the
      Note: Now be SILENT. Give the customer the pen and
      indicate the SUBMIT OFFER button. Wait for the customer to
      respond first. About 10% of your customers will sign on
      the first offer. Don't blow it by talking.
-----

```

FIG. 60

```

-----
Wk: 0110 Note: Hit HIDE SCRIPT now. Hit SHOW SCRIPT when you are
ready to see the script again. Hit PREVIOUS if you'd like
to go back to one of the previous scripts.
-----
Wk: 0200 Prospects objects to one or more of the following:
-----
Price (Rate)
Terms (Rate)
Trade Allowance
More
-----
Wk: 0310 Prospects objects to one or more of the following: (cont'd)
Money Down
More
-----
Wk: 0300
Wk: 0400
Wk: 0500
Wk: 0210
Wk: 0600
Wk: 0700
Wk: 0710
-----

```

FIG. 61

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
WRI 0270	Prospects objects to one or more of the following: (cont'd)	Not sure Not buying today Spouse not here Need time to think			WRI 0800 WRI 0810 WRI 0820 WRI 0830
WRI 0300	We believe we offer our vehicles for a fair, already discounted price. What price did you have in mind?	Continue			WRI 0310
WRI 0310	Note: Hit HIDE SCRIPT and SUBMIT OFFER.			UNITISELL	
WRI 0320	All we need is your OK (right here and we can get the paperwork started). Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.	Mgmt accepts offer Mgmt counter-offer OK More Objections			WRI 0320 WRI 0330 WRI 1000 WRI 0230
WRI 0330	Mgmt has responded with a counter-offer. All we need is your OK (right here and we can get the paperwork started). Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.	OK More Objections			WRI 1030 WRI 0200
WRI 0400	Of course, this rate is based on an average person's credit history. We can check your history now to determine if you qualify for any special financing. We can also increase the term (months) to bring the payment down.	Apply for credit Increase term			WRI 0410 WRI 0430
WRI 0410	Note: Hit the CBI step button now to begin gathering data for the credit history check. Hit the WRI step button when you are ready to return to the write-up.	Continue			WRI 9999
WRI 0430	Note: Hit HIDE SCRIPT, change the term, and hit SUBMIT OFFER. You will then need to wait for the desk to respond.	Mgmt accepts term Mgmt counter-offer			WRI 0440 WRI 0450

FIG. 62



<p>WRI 0440 The computer has generated the new unit. All we need is          Your OK right here and we can get the paperwork started.          Note: Now be SILENT. Give the customer the pen and          indicate the SUBMIT OFFER button. Wait for the customer          to respond first.</p>	<p>OK          More Objections</p>	<p>WRI 1000          WRI 0200</p>
<p>WRI 0450 Mgmt has responded with a counter-offer. All we need is          Your OK right here and we can get the paperwork started.          Note: Now be SILENT. Give the customer the pen and          indicate the SUBMIT OFFER button. Wait for the customer          to respond first.</p>	<p>OK          More Objections</p>	<p>WRI 1000          WRI 0200</p>
<p>WRI 0460 Of course, the trade value is based on the Houston market's</p>	<p>Maintenance record</p>	<p>WRI 0510</p>

FIG. 63

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
---	---	---	---	---	---
	demand for the vehicle and the condition of the vehicle. Can you tell me anything about this vehicle which I can pass on to the Used Vehicle Buyer to indicate it's a value?	Allow phone calls Both			WRI 0520
	Can you help me to provide us the maintenance records or allow the next owner to call you with questions about the vehicle?	Just wants more \$\$			WRI 0530
					WRI 0540
---	---	---	---	---	---
WRI 0510	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to provide us with maintenance records that indicate regular maintenance was performed on this vehicle. Will you allow him more money for his trade-in?	Continue			WRI 0570
---	---	---	---	---	---
WRI 0520	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to allow us to give the next customer his name and phone number to call if he has any questions. Will you allow him more money for his trade-in?	Continue			WRI 0570
---	---	---	---	---	---
WRI 0530	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to provide us with maintenance records that indicate regular maintenance was performed on this vehicle. And he is willing to allow us to give the next customer his name and phone number to call if he has any questions. Will you allow him more money for his trade-in?	Continue			WRI 0570
---	---	---	---	---	---
WRI 0540	How much more money do you think you need for your vehicle?	<\$500 >\$500			WRI 0550 WRI 0580
---	---	---	---	---	---
WRI 0550	Call the Used Vehicle Buyer. Tell him (with the customer present): My customer doesn't have the maintenance records nor does he want a stranger calling him with questions about his old vehicle. However, he really believes his car is worth a few hundred dollars more. Is there anything you can do for him? Do you mind taking another look at the vehicle with the customer present?	Re-evaluate trade More money No more money			WRI 0560 WRI 0570 WRI 0580
---	---	---	---	---	---

FIG. 64

WRI 0570 - If the Buyer is available, say: Let's walk out to see the Available  
 Used Vehicle Buyer: now and we'll re-evaluate your trade-in: Not Available  
 - If the Buyer is not available, say: The Buyer isn't  
 available now. Let's proceed with the credit process while  
 we wait.  
 -----  
 WRI 0570 Well, it looks like we can give you \$ ..... for your trade. Yes  
 Is this acceptable to you? No  
 -----  
 WRI 0590 Well, it sounds as if you will have better luck with this  
 vehicle selling it yourself. If you don't mind dealing with  
 strangers or taking the chance of not selling it.

TRADEGROSS

0

Yes, trade-in  
No, don't trade-in

TRADEGROSS

FIG. 65

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO PUT DATA	IN FIELD	STEP SEQ
	Immediately. You also have a cost associated with advertising the vehicle and you lose the tax benefit from applying the trade to the new vehicle sale price. Would you like to proceed without the trade?				
WRI 0590	Note: HIT HIDE SCRIPT and SUBMIT OFFER.	Mgmt accepts offer			WRI 0591
WRI 0595	All we need is your OK right here and we can get the paperwork started.	OK			WRI 1000
	Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.	More objections			WRI 0200
WRI 0600	Of course, there are several ways to decrease the payment. We can check your history now to determine if your credit will get you a better rate than the average rate we use as an example. We can also bump the term (monthly) up. You may also put more money down.				
WRI 0610	Note choices:	Better rate Bump term More money down Other			WRI 0410 WRI 0700 WRI 0801
WRI 0620	Note choices:	Trade allowance Price			WRI 0500 WRI 0300
WRI 0700	Of course, how much money would you like to put down?	Continue			WRI 0310
WRI 0800	Just hit sure:	Don't like Something else Not sure/need time			WRI 0803 WRI 0200 WRI 0801
WRI 0901	Just not sure: Well, I can understand your concern. Let me get a better idea of what you need. I can help you with you, and you can call me if you have any questions. That way you can consider your purchase at your leisure.	Continue			WRI 0802

FIG. 66

WRI 0802 Just not sure:  
 Now, let's make an appointment for you to return. Would  
 this evening or tomorrow be more convenient?  
 -----  
 WRI 0803 That wouldn't keep you from owning it, would it?  
 -----  
 WRI 0804 We have three choices then. We can look for another  
 vehicle which better suits your needs. We can let you think  
 about this vehicle and make an appointment to come back,  
 or you can buy this vehicle now.  
 -----  
 WRI 0805  
 WRI 0806  
 WRI 1000

Continue

APPTDATE

No

Yes

Maybe

 Another vehicle  
 Make appointment  
 Buy this vehicle
 

FIG. 67

```

PRINT T1002          PRINT 415 RECORDS - REPORT 022
STEP SEQ  SCRIPT TEXT
-----
WRI 0805 Let's find a vehicle for you that you really want. Let
me check my computer to see if we have something else that
better suits the needs you've described to me.
-----
WRI 0806 It may be necessary to switch the prospect on to another
vehicle at this point. If this is the case, go back to the
SEL (select) step to help them find another vehicle.
Hit the BACK key now.
-----
WRI 0810 Not buying today: I respect that you are not planning to
buy today. However, let me ask you one question. Is there
any single item that is preventing you from coming to a
decision today? What is that item? If we can take care
of that, will you consider buying?
-----
WRI 0811 Not buying today: (cont'd)
You may need to hit the MANAGER button now for
assistance. Or you may determine based on their answer
that they absolutely will not buy today. On your
may find that they will answer their objection yourself.
-----
WRI 0812 Not buying today: (cont'd)
I'll respect your wishes. Let's make an appointment for
you to come back in when you are closer to a decision.
Would tomorrow or the next day be more convenient
for you?
-----
WRI 0820 Spouse not here:
I can certainly appreciate the fact that you would want
your spouse involved in the decision. Allow me to gather
all the information together for you so you can get on
your way.
-----
WRI 0821 Spouse not here:
Let's make an appointment for you and your spouse to
return together. Would this evening or tomorrow be more
convenient?
-----

```

```

-----
ANSWER      QCTO PUT DATA  IN FIELD  STEP SEQ
-----
Continue
-----
WRI 0806
-----
Continue
-----
WRI 0810
-----
Yes
Not buying today
-----
WRI 0811
WRI 0812
-----
Continue
-----
WRI 0200
-----
Continue
-----
WRI 0822
-----
APPTDATE
-----
WRI 0821
-----
Continue
-----
WRI 0822
-----
APPTDATE
-----

```

FIG. 68

**FIG. 69**

CLMT TSD22 PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE= 29

STEP SEQ	SCRIPT TEXT	ANSWER	GOTO	BUT DATA	IN FIELD	STEP SEQ
WR1 0827	Cell phone:	Cell also given				WR1 0827
		Continue				WR1 0828
		Home also given				WR1 0825
		Continue				WR1 0829
		Continue				WR1 9999
WR1 0828	Great, I'll see you then.					
WR1 0829	More: Walk the prospect out, and if you aren't sure of his/her credit, ask the prospect to call you back. I'd like to ask one last question of you. When you go home to think about this decision, what will be your biggest concern? Perhaps I'll be able to think of a way to address it before you return.					
WR1 0830	Need time to think:					
	Take all the time you need. Why don't I leave you alone for a moment to process everything. Can I get you anything while I'm up?	OK - ready to sign Still need time More objections				WR1 1000 WR1 0840 WR1 0200
WR1 0840	Still need more time: (cont'd)	Continue				WR1 0822
	I'll respect your wishes. Let's make an appointment for you to come back in when you are closer to a decision. Would tomorrow or the next day be more convenient for you?				APPTDATE	
WR1 1000	Note: Congratulations on completing the write-up step. The next step is the credit application process.	Continue				WR1 9999

PRINT ENDED AT: 15:36:05

FIG. 70